The California Developmental Disabilities Information System

Department of Developmental Services
"Building Partnerships, Supporting Choices"

Deloitte Consulting

THE echo GROUP

06 Training Plan
FINAL Rev 4

October 30, 2003

Revision History

This section will contain details of changes to the document.

Date	Version	Description of Updates	Author
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1 Introduction

As outlined in RFP-DDS-0016, the California Department of Developmental Services (hereafter referred to as DDS) requires that in order to execute the CADDIS implementation project, the CADDIS Implementation Management Team must provide a CADDIS Training Plan (hereafter referred to as the Plan) that defines the overall approach for training Certified CADDIS Trainers, creating training material for CADDIS users, and conducting hands-on training for Regional Center and DDS technical staff. The Plan must identify the various types of training that will be offered, the respective target audience, the tools that will be utilized, the location and timing of the training, anticipated class size, class duration, and the degree of involvement required from the DDS and/or Regional Center staff.

This Plan is designed to be compatible with the overall Project Plan and consistent with the phased implementation approach for CADDIS. The Plan will be used to communicate to project stakeholders about the resource needs, tasks, work products, and roles/responsibilities required as well as milestone and deliverable dependencies related to training.

As this Plan is implemented, members of DDS staff who do not have day-to-day responsibility for CADDIS Training but who have a vested interest will be invited to attend training meetings. DDS or the Training Team may invite additional DDS and Regional Center participants to the Weekly Training Plan Meeting if appropriate. Their participation will allow them to assist with the development of training material and help prepare them for the transition when the CADDIS Training Team's responsibilities conclude. The CADDIS Training Team consists of the Training Lead, the CADDIS Implementation Management Team, Instructional Designers and Trainers.

Additionally, meetings and work sessions may be scheduled with the appropriate DDS team members and selected Regional Center Subject Matter Experts as the CADDIS Training Team designs, delivers and evaluates CADDIS training to share information about CADDIS training efforts. These meetings will allow DDS team members and selected Regional Center Subject Matter Experts to provide guidance and support in the design and development of the training program and to provide functional expertise. These meetings will be scheduled on an as needed basis and will most likely occur during the Training Material Quality Assurance Review process.

In order to meet DDS's requirements, the CADDIS Training Team has developed this Plan which provides a blueprint for all training design and delivery. Successful CADDIS training will meet the following objectives:

- Instill CADDIS application knowledge throughout DDS and the Regional Centers.

- Maximize learning by emphasizing hands-on training.

- Allow users to put their newly gained knowledge to work quickly.

- Create self-sufficient users by training users how to use online help and other application resources.

1.1 Overview of the CADDIS Training Plan

This Plan will serve as a guide for the CADDIS Training Team, DDS, and Regional Center staff who have the responsibility for successfully implementing CADDIS training. The CADDIS Training Team will update this Plan as required by the project on the dates specified in the Project Workplan.

This Plan outlines the strategy and approach for identifying training curricula, target audiences, material design, and tools that will be used for training development. In addition, roles and responsibilities for training are identified. This Plan is based on the requirements and format outlined in the DDS RFP for

CADDIS and provides an overview of the training tools and material to be developed to support CADDIS training. The actual training material will be developed based on approval of this Plan. The Draft Training Material will be submitted to the CADDIS Project Management Team on October 10, 2003 as indicated in the Project Workplan. The Final Training Material will be submitted on November 3, 2003 as indicated in the Project Workplan.

The RFP requested that this Plan meet the following minimum requirements:

- Introduction
  - o Overview
  - o Scope
- Overview
- Training Structure and Delivery Approach
  - o Roles and Responsibilities
  - o Tools and Techniques
  - o Training Delivery Approach
- Training Schedule and Locations
- Training Environment
- Appendices

This Plan meets the requirements of the CADDIS RFP. In addition, it has been designed and organized to follow the Training Development Methodology used by Deloitte Consulting and shown in *Figure 1 – Training Development Methodology* below, to help validate that all phases of training development and delivery are understood and implemented. This instructional design and development methodology will provide the framework from which the CADDIS Training Team will analyze, design, develop and deliver the CADDIS training program.

Training Development Methodology
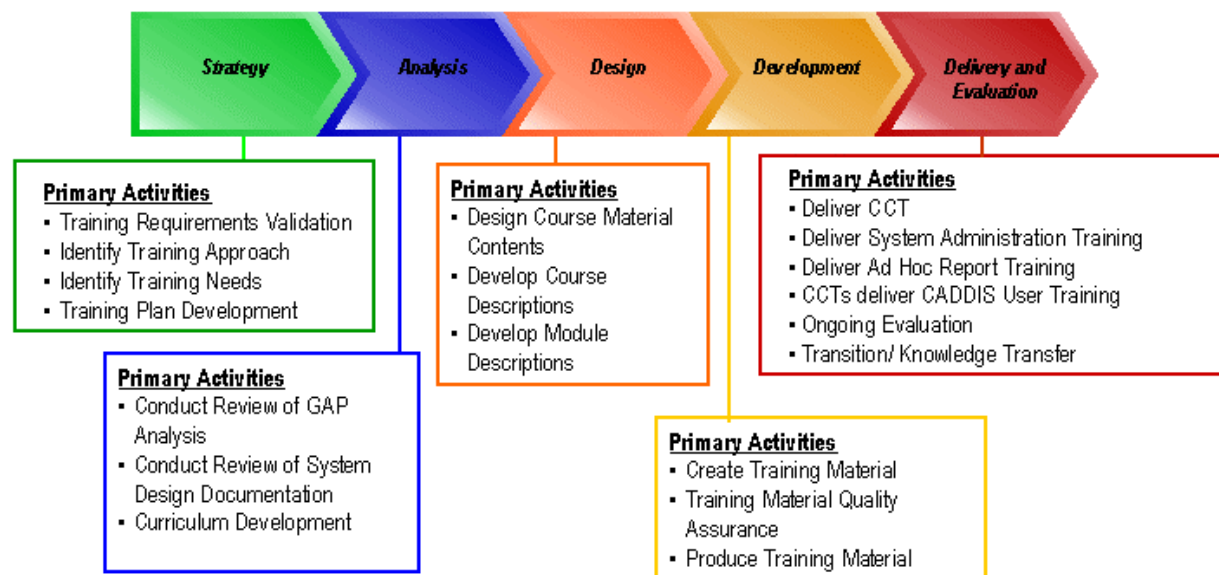
Figure 1 – Training Development Methodology

This methodology will be the blueprint for implementing the training program for CADDIS. This Plan is organized to provide details for each phase of this methodology.

The methodology contains five key components or phases: Strategy, Analysis, Design, Development, and Delivery and Evaluation. Specific approaches are developed within this framework to address the needs of each phase. While certain activities in each phase may overlap, the methodology will guide the Training Team through successful training development and delivery. For example, training logistics is a part of the delivery phase but should be addressed early in the development process to allow time for the identification of appropriate training facilities. Each phase of this methodology is described below:

- **Strategy** – The Strategy phase is crucial to the overall success and effectiveness of the CADDIS training program. It provides the focus and direction for the entire training program design, development, and implementation effort. This phase includes developing the Plan and the identification of a training contact for each Regional Center. The Strategy phase is detailed in *Section 2 – Training Strategy*.

- **Analysis** – The Analysis phase answers the "what" questions of the training design process and

begins with the analysis of the CADDIS training program requirements. This phase includes validation of the CADDIS requirements attributable to training and determining the appropriate course curriculum for CADDIS by analyzing the GAP analysis results and the CADDIS System Design deliverable for appropriate user processes. This phase also includes an assessment of Regional Centers for training classroom availability. The Analysis phase is detailed in *Section 3 – Training Analysis*.

- **Design** – The Design phase forms the link between the Analysis phase and the actual development of the CADDIS training material. During this phase, the CADDIS Training Team will combine its understanding of the training program requirements, GAP results, and CADDIS System Design deliverable to develop detailed course outlines, descriptions, and the training material "look and feel." The Design phase is detailed in *Section 4 – Training Design*.

- **Development** – During the Development phase the Training Team will create the training course material. A rigorous quality assurance procedure will be incorporated to help validate that all course material is consistent and meets CADDIS requirements. This phase will also include the finalization of training locations and course schedules. The Development phase is detailed in *Section 5 – Training Development*.

- **Delivery** – During the Delivery phase, the training courses will be conducted. The Delivery phase is detailed in *Section 6 – Training Delivery*.

- **Evaluation** – The Evaluation phase will run concurrently with the Delivery phase. All courses will be evaluated for the effectiveness of the training program delivery approach and supporting training material. The Evaluation phase is detailed in *Section 7 – Training Evaluation*.

This Plan also includes Post-Training Support activities in *Section 8 – Post-Training Support* and training program roles and responsibilities in *Section 9 – CADDIS Roles and Responsibilities*.

1.2 Scope of the Training Plan

This Plan will address DDS and Regional Center training that directly relates to the content and scope of the CADDIS application. Therefore, training courses will focus on CADDIS functionality. This Plan will detail the strategy for the following types of training:

- Certified CADDIS Training for Regional Center participants,

- Certified CADDIS Training for DDS Help Desk staff,

- CADDIS User Training material for use by the Regional Center Certified CADDIS trainers,

- Hands-on System Administration Training for DDS and Regional Center Help Desk and technical staff, and

- Ad Hoc Report Training for DDS and Regional Center staff.

1.2.1 Certified CADDIS Training for Regional Center Participants

The CADDIS project includes training requirements for the delivery of CADDIS train-the-trainer courses. To meet this requirement, the CADDIS Training Team will develop and deliver training to approximately 120 Certified CADDIS Trainers from the 21 Regional Centers. The strategy for this training is detailed in *Section 2.1.1 – Strategy for Implementing Certified CADDIS Training for Regional Center Participants*.

1.2.2 Certified CADDIS Training for DDS Help Desk Staff

The CADDIS project includes training requirements for the delivery of Certified CADDIS Training to DDS

Help Desk Staff. To meet this requirement, the CADDIS Training Team will develop and deliver training to a maximum of 12 DDS Help Desk Staff. The strategy for this training is detailed in *Section 2.1.2 – Strategy for Implementing Certified CADDIS Training for DDS Help Desk Staff*.

1.2.3 CADDIS User Training

The CADDIS project includes training requirements for the development of training material to be used by Certified CADDIS Trainers to deliver CADDIS User Training at their respective Regional Centers. To meet this requirement, the CADDIS Training Team will develop training material in a modular manner so that they can be used for all CADDIS users. The strategy for this development is detailed in *Section 2.1.2 – Strategy for Implementing CADDIS User Training*.

1.2.4 System Administration Training

The CADDIS project includes training requirements for the delivery of on-site, hands-on Technical Training (referred to hereafter as System Administration Training). To meet this requirement, the CADDIS Training Team will deliver CADDIS System Administration Training to 44 DDS and Regional Center technical (computer) and Help Desk staff. It is anticipated that these participants may be responsible for providing System Administration Training to others at DDS and the Regional Centers using the CADDIS Systems Operation Manual and CADDIS User Manual. The strategy for this training is detailed in *Section 2.1.3 – Strategy for Implementing System Administration Training*.

1.2.5 Ad Hoc Report Training

The CADDIS project includes training requirements for the delivery of Ad Hoc Report Training. To meet this requirement, the CADDIS Training Team will deliver Ad Hoc Report Training for up to 12 participants at DDS and each Regional Center.   These participants will be CADDIS report developers. It is expected that these participants may train others at their Regional Center on *ad hoc* report build functions using the Actuate Ad Hoc Report Manual that will be provided by the CADDIS Training Team. The strategy for this training is detailed in *Section 2.1.4 – Strategy for Implementing Ad Hoc Report Training*.

1.2.6 Assumptions of the CADDIS Training Plan

The general assumptions that underlie the development and delivery of CADDIS Training are as follows:

- The Training Team will develop training modules based on CADDIS end user processes. This will not include training that would apply to general computer comfort and literacy, program policy, or changes to DDS/Regional Center policies and procedures.

- CADDIS training will be designed and developed according to the requirements stated in the project contract, or mutual agreements reached during subsequent negotiations and planning sessions.

- All course material will be evaluated by DDS in adherence with the standard CADDIS deliverable review process. This evaluation will occur prior to the implementation of the courses and will occur in the timeframes indicated in the Project Workplan to allow sufficient time for required modifications.

- All training participants will have completed appropriate DDS and Regional Center program orientations and will have an overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. Participants will also have an

overall understanding of Regional Center program policies and work processes. Any policy and procedure questions raised during training will be documented and forwarded to DDS for follow-up.

- The CADDIS Help Desk will be operational prior to Pilot training. The Training Team will deliver a Certified CADDIS Training session to DDS Help Desk staff from October 19, 2003 through October 29, 2003. DDS will provide an on-site room and computers for this training. Prior to this training, DDS Help Desk staff will be involved in CADDIS System and Integration testing.   In addition, it is recommended that DDS Help Desk staff be involved in User Acceptance Testing to advance their working knowledge and overall familiarity with the system.

- All Regional Center staff will have completed the required CADDIS User pre-requisites prior to CADDIS User training.   All Regional Center staff who participate in Certified CADDIS Training will have completed both the CADDIS User pre-requisites and the Certified CADDIS Training pre-requisites. It is expected that Regional Centers will review the pre-requisites and use them to select training participants who meet the pre-requisites.

- Participants attending the Certified CADDIS Training who are Service Coordinators will first attend the CDER and/or Early Start assessment training that will be developed and delivered by DDS staff.

- Certified CADDIS Training will consist of nine days of instruction, including a three-hour and 45 minute web-based CADDIS 101 – Fundamentals course. Regional Centers will be responsible for providing computers with Internet access for this course if their participants will not be at the training site on that scheduled day of training. Participants can attend this session via the Internet from their own Regional Center. Participants must attend this course before taking subsequent Certified CADDIS Training courses. This course will provide participants with an understanding of the relationship between the various functions in CADDIS. It is strongly recommended that Regional Centers send at least one participant to all of the Certified CADDIS Training courses. This approach will help these participants understand all CADDIS processes and the flow of work from one CADDIS module to the next. This knowledge will allow them to explain CADDIS as a whole to CADDIS users and they will have sufficient cross-functional understanding to teach users in all modules if needed.

- CADDIS terminology will be incorporated throughout the training material as appropriate so that participants will understand the new terms and relate them to terms they use.

- Changes in business processes, procedures or policies that may affect staff using CADDIS will be defined by DDS and communicated to staff by the Regional Centers prior to Certified CADDIS Training.

- For Certified CADDIS Training, the ratio of trainees to trainers will be targeted for 12-to-1. There will be a 1-to-1 ratio of trainee to PC.

- The Training Team is responsible for providing classrooms for the Certified CADDIS Training. Wherever possible, classrooms at the Regional Centers will be utilized. If the training does occur in a location other than DDS or a Regional Center office, the CADDIS application will be accessed over the Internet.

- DDS is responsible for securing a classroom, computers, and equipment for the pilot Certified CADDIS Training at Valley Mountain Regional Center.

- DDS will make the final determination regarding the number of attendees each Regional Center

can send to Certified CADDIS Training. They may choose to allow the larger Regional Centers to send more participants than the smaller Regional Centers. However, the total number of participants will not exceed 12 participants during any single session or a total of approximately 120 participants overall.

- Regional Centers that have a 9/80 work schedule will need to arrange Certified CADDIS Training participant schedules to accommodate the training schedule.

- Certified CADDIS Training during system implementation will include approximately one to two hours of scheduled, supervised Sandbox time during each course. This will allow the participants to continue to practice what they learned during training. In addition to supervised time, the participants will have access to the Sandbox after their training to practice on their own.

- Regional Centers, with the assistance of DDS, will identify appropriate staff to receive Certified CADDIS Training and confirm that they are available to attend their scheduled training.

- The DDS Training Officer will be available to assist with logistics and coordination with the Regional Centers before and during Certified CADDIS Training.

- During Certified CADDIS Training the Regional Center host site will select one Subject Matter Expert as one of the training participants or as a separate attendee at each training session. The Subject Matter Expert(s) will assist with answering business process and policy questions. The Subject Matter Expert(s) should be selected based on their involvement in the CADDIS design process such as attendance during System Design Review sessions or testing processes.

- DDS will be responsible for printing and making the necessary copies of all training material that is used by the CADDIS Training Team to deliver the Certified CADDIS Training courses.

- Certified CADDIS Trainers will be responsible for training users at their Regional Center.

- Regional Centers will be responsible for providing training rooms, scheduling training, copying training material, providing equipment, and using Certified CADDIS Trainers to conduct CADDIS User Training.

- Staff will be trained by the Certified CADDIS Trainers no more than three weeks in advance of when they are scheduled to begin using CADDIS in their office or unit.

- DDS will assist the Regional Centers, if needed, to identify appropriate staff to attend CADDIS User Training sessions.

- During the Certified CADDIS Training courses participants will build on information as they progress through the lessons. Participants will complete exercises in each course module and a mastery evaluation at the end of each course that will include multiple CADDIS functions that were learned during the course. The course instructor will monitor the students during each exercise and the mastery evaluation to validate that each student is entering correct information.

2 Training Strategy

The first phase of training implementation is strategy. This phase determines the approach to training delivery and training implementation timelines. This phase has already been completed and the results are reflected in this Plan. This phase is crucial to the overall success and effectiveness of the training program. It provides the focus and direction for the entire training design, development, and delivery effort. The activities during this phase include reviewing the RFP requirements and the Deloitte Consulting final proposal for the CADDIS Project to help shape the CADDIS Training Team's strategy to best meet those requirements.

The Training Strategy phase includes the following tasks:

- Develop a training strategy and Plan to implement the Deloitte Consulting final proposal.

- Validate that training activities coincide with CADDIS implementation and define critical training design, development and delivery milestones and dates.

- Identify the tools and environment to be used for training development and delivery.

These tasks are described in more detail in the sections below.

2.1 Strategy for Implementation of Training Requirements

The RFP Training requirements (outlined in RFP Section VI.D.8) and Deloitte Consulting final proposal were the primary driver for developing the Training Strategy. Therefore, the first step was to review the RFP requirements and the CADDIS Team's proposed approach to meet those requirements. Based on the proposal, the training strategy is detailed below.

2.1.1 Strategy for Implementing Certified CADDIS Training for Regional Center Participants

The requirements for Certified CADDIS Training for Regional Center participants are as follows:

- Develop a training curriculum that is suited for approximately 120 Certified CADDIS Trainers.

- Conduct Certified CADDIS Training.

To meet these requirements, an instructor-led, train-the-trainer approach will be implemented. The Training Team will provide approximately 120 Regional Center staff with training on CADDIS user processes and presentation skills. These Certified CADDIS trainers will then be responsible for conducting CADDIS User Training for approximately 5,000 Regional Center CADDIS users.

Certified CADDIS Training will be conducted at five geographic locations to accommodate the statewide distribution of participants, including Sacramento, the Bay Area, Fresno, and two Southern California sites. Pilot Certified CADDIS Training will be conducted at Inland Regional Center and Valley Mountain Regional Center. The pilot locations will include one session each of Certified CADDIS Training. The Training will begin five weeks prior to the Pilot and go-live for each Wave in order to allow for the Regional Centers to provide CADDIS User Training in a just-in-time manner, starting three weeks before each go-live. The CADDIS Training Team is responsible for identifying and securing appropriate training facilities for the Certified CADDIS Training classes. It is recommended, however, that training classrooms be secured at Regional Centers to reduce the impact of travel for the greatest majority of attendees. *Section 6.3 – Training Schedule and Locations for Certified CADDIS Training* includes a training schedule for each phase.

This training will include hands-on components such as system demonstrations and practice exercises.

In order to achieve this, a Training Environment will be established for training delivery. *Section 2.3.6 – CADDIS Training Environment,* below, includes a discussion of this Environment.

DDS and the Regional Centers are responsible for identifying and providing staff to become Certified CADDIS Trainers. Each Certified CADDIS Training session will include nine days of courses. This training will be process driven and will focus on hands-on exercises in the system. Each exercise will build on previous exercises during the course in order to build an understanding of how the CADDIS processes link together. Each Regional Center should send 4-6 staff members to this training. In addition to CADDIS training, Certified CADDIS Trainers will receive presentation skills training. Recommendations for selection of Certified CADDIS Trainers are listed in *Section 4.4.1 – Recommendations for Certified CADDIS Training Participants.*

Additional training for Certified CADDIS Trainers will be provided twice each in Sacramento and Los Angeles during the Warranty year of the contract for a total of 48 participants (maximum of 12 participants per session).

2.1.2 Strategy for Implementing Certified CADDIS Training for DDS Help Desk Staff

The requirement for Certified CADDIS Training for DDS Help Desk staff is as follows:

- Provide Certified CADDIS Training to DDS.

To meet this requirement, the Training Team will provide a maximum of 12 DDS Help Desk staff with training on CADDIS user processes and presentation skills. This nine-day Certified CADDIS Training will be conducted at DDS from October 19, 2003 through October 29, 2003. The training material that will be used for Regional Center Certified CADDIS Training will also be used for this course.

DDS is responsible for identifying and securing a classroom, computers, and equipment for this course. DDS is also responsible for identifying the DDS Help Desk staff participants for this course. This training will be process driven and will focus on hands-on exercises in the system. Each exercise will build on previous exercises during the course in order to build an understanding of how the CADDIS processes link together.

2.1.3 Strategy for Implementing CADDIS User Training

The requirements for CADDIS User Training are as follows:

- Develop a training curriculum that is suited for 5,000 end-users.

- Develop training material for use by DDS and by the Certified CADDIS Trainers.

Certified CADDIS Trainers will be responsible for conducting CADDIS User Training at their Regional Centers. The CADDIS Training Team will prepare a curriculum and training material. The material will incorporate techniques designed to prepare the participants to use CADDIS on-the-job when they return from training. Pre-requisites to attend this training (computer literacy, DDS policy and procedure knowledge, etc.) have been identified so that DDS and the Regional Centers can prepare each participant with the foundation required to benefit from the CADDIS training. These pre-requisites are listed in *Section 6.2.1 – CADDIS User Pre-requisites*.

The participants will be introduced to CADDIS processes, will be given detailed information on system activities that are applicable to their user group, and will be given the opportunity to practice CADDIS

processes that are related to their job. Hands-on exercises and evaluations will provide feedback to the participant and the instructor on the preliminary readiness of the user to work in CADDIS.

During each course the instructor will provide an overview of the course, describe the related processes within CADDIS, and demonstrate the user processes in CADDIS. Each course module will include an overview, objectives, and demonstrations. After instruction, each participant will have the opportunity to practice using CADDIS by performing related hands-on exercises in the Training Environment.

This process will be repeated until all course modules have been completed. The users will then take a course "mastery evaluation" which is an exercise that will cover a variety of the processes learned in the course. This will help the learner understand how the module components fit together.

Certified CADDIS Trainers will be encouraged to emphasize the use of performance support tools that will aid the user on the job. These tools include the training material, online help, the CADDIS Sandbox Environment, and the CADDIS User Guide.

By presenting the training content in this manner, adult learning theory is supported. Trainees will be given an opportunity to learn in the manner in which they prefer to learn because all of the learning styles will be included. The learning styles are as follows:

- **Auditory Learners**, or those who learn best by *listening*, will be supported through the use of instructor-led presentations of the course content.

- **Visual Learners**, or those who learn best by *seeing*, will be supported through the use of the participant material and the instructor-led demonstrations of the CADDIS processes.

- **Kinesthetic Learners**, or those learners who learn best by *doing*, will be supported through the use of the hands-on exercises and on-line access to the CADDIS Training Environment.

Section 4 – Training Design provides further detail for designing training material that will meet the needs of CADDIS users.

2.1.4 Strategy for Implementing System Administration Training

The requirement for System Administration Training is as follows:

- Provide on-site, hands-on, in-depth training to approximately 44 Regional Center and DDS technical staff.

To meet this requirement, the CADDIS Training Team or Implementation Team will conduct training at DDS and the 21 Regional Centers prior to their go-live dates. System Administration Training will focus on system administration tasks such as establishing user IDs and passwords. The Systems Operating Manual and Help Desk Manual will be used as the primary training tools. Two staff from DDS and each Regional Center will receive this training.

Because of the low number of attendees for the System Administration Training sessions, the training will be conducted in an informal manner. For example, the training may take place in an office if the correct computer equipment is available for the two participants and the training can be conducted without disruption. The Regional Centers will be responsible for providing the locations for this training.

The Training Team will provide a schedule for System Administration Training to DDS on August 29, 2003.

2.1.5 Strategy for Implementing Ad Hoc Report Training

The requirement for Ad Hoc Report Training is as follows:

- Provide training on the *ad hoc* report writer for report developers.

To meet this requirement, the CADDIS Training Team or Implementation Team will provide on-site, hands-on training in creating *ad hoc* reports for up to 12 participants at DDS and each Regional Center who are responsible for *ad hoc* report building. The Regional Centers will be responsible for providing a room and computers with intranet access to HHSDC for this training. Pre-requisites for this course are described in *Appendix 2 – System Administration Training and Ad Hoc Report Training Curriculum*.

The Training Team will provide a schedule for Ad Hoc Report Training to DDS on August 29, 2003.

2.2 Integration with CADDIS Implementation

CADDIS training implementation is interdependent with successful CADDIS implementation. Therefore, the schedule for CADDIS implementation will drive the training tasks and schedule. Trainees will be trained as close as possible to the time when they must use the system to perform their job duties. Specifically, to support the effectiveness of both Certified CADDIS Training and CADDIS User Training, the following activities must be completed before the delivery of training:

- Prior to training, system design and CADDIS software development must be completed.

- Prior to CADDIS User training at each Regional Center, the infrastructure to support CADDIS User Training must be in place.

Details of the implementation timelines for training are described below in *Table 1 – Training Implementation Timelines*. This includes training milestones, schedule, key activities, and project implementation dependencies. Please note that some of the schedule dates overlap if dependencies do not hinder successful completion of a milestone.

Training Milestone	Schedule	Key Activities	Project Implementation Dependencies
Training Strategy	05/19/2003 to 06/20/2003	Develop the Training Plan to include details of all phases of the training development and delivery process. Identify a training contact at each Regional Center.	Completion of the GAP Analysis and draft System Design deliverable.
Training Analysis	05/19/2003 to 07/14/2003	Assess Regional Centers for training classroom availability. Conduct a detailed review of the GAP Analysis and System Design deliverable for course material design.	Completion of the GAP Analysis and System Design deliverable.

Training Milestone	Schedule	Key Activities	Project Implementation Dependencies
Training Design	06/20/2003 to 09/12/2003	Finalize the training material "look and feel." Develop course content outlines. Develop course descriptions.	Completion of the Draft Training Plan.
Training Material Development, Quality Assurance Reviews, and packaging of material	07/15/2003 to 11/03/2003	Develop all course material content and exercises. Conduct quality assurance reviews of all material. Review and test selected course material. Finalize the training locations and communicate the schedule to the Regional Centers.	Completion of Training Material design. Completion of Training Environment setup.
Updated Training Plan	10/14/2003 to 10/24/2003	Update the Training Plan for final approval.	Completion of the final Training Plan and review of the final Training Plan by DDS. Completion of final curriculum design and course schedules. Completion of final training location identification.

Training Milestone	Schedule	Key Activities	Project Implementation Dependencies
Training Delivery	11/10/2003 to 04/02/2004	Deliver Certified CADDIS Training. Deliver hands-on System Administration Training and Ad Hoc Report Training. Review participant evaluations of training course success.	Completion of CADDIS software development. Completion of training material development and quality assurance review. Approval of draft training material by DDS prior to Pilot Certified CADDIS Training. Approval of final training material by DDS prior to Wave 1 Certified CADDIS Training. Loading of training exercise data in the Training Environment. Completion of Regional Center identification of Certified CADDIS Training participants and final scheduling of participants for training.
Conduct follow-up training	TBD	Conduct two follow-up CADDIS Training courses during the Warranty year.	Completion of Wave 3 Certified CADDIS Training.

Table 1 – Training Implementation Timelines

The training delivery schedule is also dependent on the CADDIS implementation schedule for the Pilot and each Regional Center. *Figure 2 – High-level CADDIS Training Schedule* below depicts the high-level training schedule that is designed to coincide with each implementation Wave.

CADDIS Training Schedule
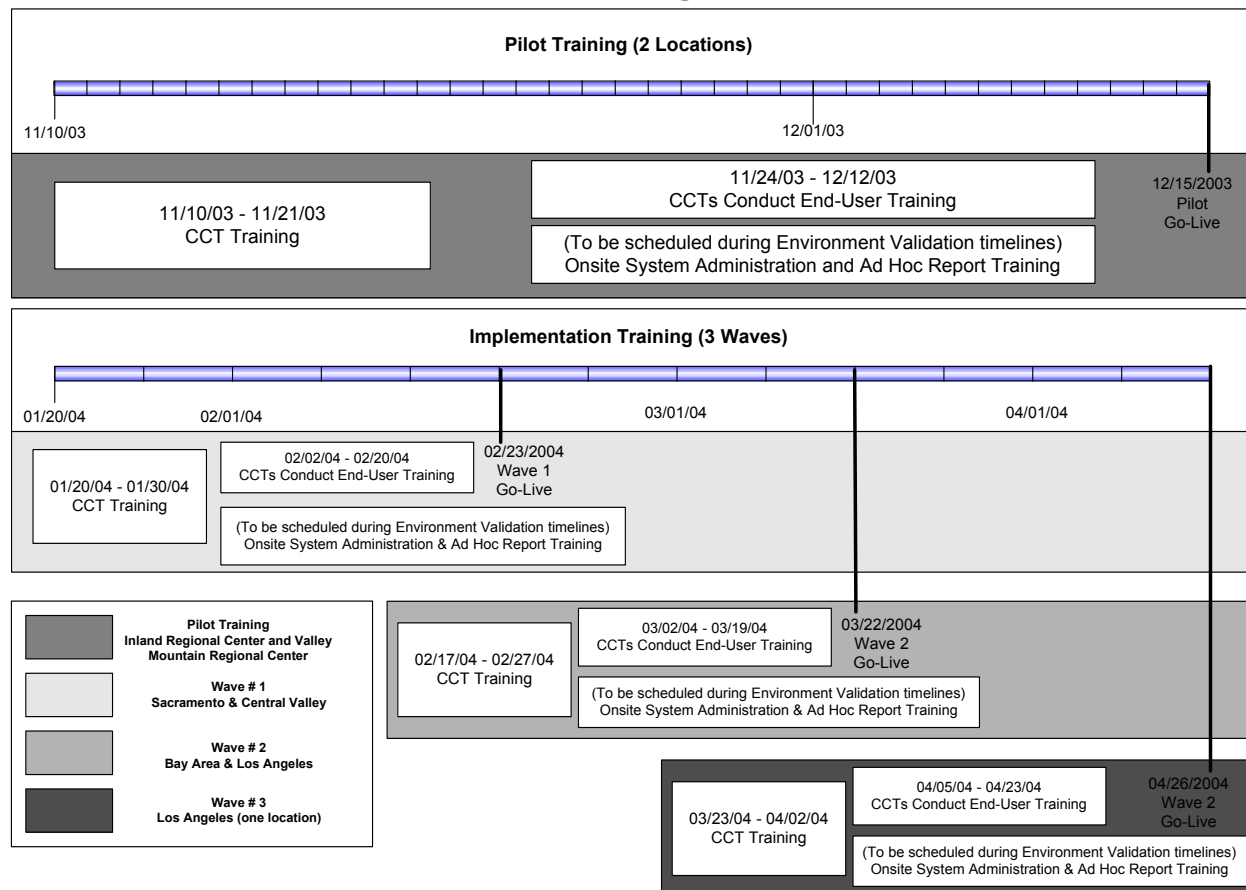
Figure 2 – High-level CADDIS Training Schedule

2.3 Training Tools and Environment

An important aspect of the training program is the selection and use of the appropriate training development and delivery tools. These tools should provide the most efficient method for developing the material that will be needed. These tools should also be appropriate for use by DDS and the Regional Centers once knowledge transfer/material transition occurs so that material developed within those tools can be maintained as necessary. This section of the Plan discusses the various tools that will be used to develop and deliver CADDIS Training. In addition, supplemental training material and the Training Environment that will be provided for training participants are described.

2.3.1 Training Material

Microsoft Word will be used to create the course material that will be compiled into Instructor and Participant Guides. Microsoft PowerPoint will be used to create Instructor Slides as appropriate for use during classroom training and as handouts to participants. Microsoft Visio will be used to create flowcharts to show the flow of information in the CADDIS system and to provide "big picture" overviews for each module. These Microsoft Office tools are standard tools that can be used by DDS to make future updates to the training material.

During the Design phase the course material outlines and "look and feel" of the training material will be finalized. Training material will be designed in a modular fashion so that Regional Centers can select the material to deliver the appropriate courses and modules to their users.

To accomplish this, training material will be developed in the following fashion:

- **Courses** – A course will be developed for each CADDIS process area which will be based on the user functions in CADDIS. A CADDIS 101 - Fundamentals course will also be developed that all CADDIS users should take. This course will include a demonstration of the CADDIS system and will set the stage for all other courses. This course will also include a demonstration of CADDIS navigation, system administration such as workflow and alerts, and report query because they are common processes that will likely be performed by all CADDIS users. During Certified CADDIS Training, CADDIS 101- Fundamentals will be conducted using a web-based presentation. Certified CADDIS Training participants will be provided with materials for this course to use during CADDIS User Training.

- **Modules** – Modules are the chapters contained in each course. A module focuses on a particular CADDIS process. For example, Accounts Payable and Accounts Receivable will each be a module in the Fiscal Course. Regional Centers will be able to reorganize these modules if needed so the various user groups can receive the proper training. For example, a user may not need to learn all processes within the Fiscal course, but may need to know how to use the General Ledger. Regional Centers can reorganize their courses by training on specific modules. This will also allow Regional Centers to pick out specific modules for introductory, beginner and advanced users. For example, each course overview can be used for introductory courses to provide a high level overview of the CADDIS process for a particular user group. Specific modules and lessons can be used for beginner courses and advanced courses can include the mastery evaluation for a more complete degree of learning.

- **Exercises and Mastery Evaluations** – Hands-on exercises will be included in each module. Each exercise will focus on a specific activity performed in CADDIS. For example, the Accounts Payable module in the Fiscal course will include exercises related to Check Issuance, Check Processing, and Overpayments. Regional Centers can re-organize these exercises depending on user needs. Each course will include a Mastery Evaluation that includes a variety of CADDIS processes within the course. If Regional Centers want to conduct an introductory or beginner course they may choose to use the exercises. If they would like to conduct an advanced course, they should use all of the module exercises as well as the Mastery Evaluation. Additional exercises will be developed for participants to use in the Sandbox Environment. These exercises will allow for further practice and to reinforce the knowledge they have gained in the classroom setting.

Section 4 – Training Design provides further detail regarding the proposed course material format and contents for the training courses.

2.3.2 CADDIS User Manual

A user manual will be developed for CADDIS as a reference tool for CADDIS users. This manual will be distributed during Certified CADDIS Training as supplemental material and as a job aid. The Certified CADDIS Trainers can then distribute the manual to CADDIS User Training participants. The manual will include the contents that are outlined in the Project Deliverable Specification for Project Deliverable 21 – User Manual, Systems Operation Manual, and Help Desk Manual.

2.3.3 Online Help

During system development, online help will be developed for CADDIS. This online help will be reviewed in the CADDIS 101 – Fundamentals course and reinforced as a valuable user tool throughout the training delivery.

2.3.4 CADDIS Systems Operation Manual

A Systems Operation Manual will be developed for CADDIS as a reference tool for DDS and Regional Center technical staff. This manual will be used as the training tool for System Administration Training. The manual will include the contents that are outlined in the Project Deliverable Specification for Project Deliverable 21 – User Manual, Systems Operation Manual, and Help Desk manual. In addition, an Actuate Reporting Manual will be used to conduct Ad Hoc Report Training.

2.3.5 CADDIS Help Desk Manual

A Help Desk Manual will be developed for CADDIS as a reference tool for DDS and Regional Center help desk staff. This manual will also be used as supplemental material for System Administration Training. The manual will include the contents that are outlined in the Project Deliverable Specification for Project Deliverable 21 – User Manual, Systems Operation Manual, and Help Desk manual.

2.3.6 CADDIS Training Environment

An important component to the training strategy is the use of hands-on training demonstrations and practice exercises. A CADDIS Training Environment will be provided to support the demonstrations and practices exercises. Training participants will be able to complete training exercises in the Training Environment that simulates the use of the production system. This will help to facilitate the transfer of skills from the classroom to the workplace.

The Training Environment will be hosted at HHSDC on the Development/Testing (DevTest) Physical Environment as logical environment DevB. Detailed technical descriptions of the logical environments are included in the Technology Architecture Plan deliverable. DevB will be ready for the CADDIS Training Team prior to the development of training material. DevB will be used to test the training exercises as they are developed. DevB will be standardized and will not be configured for each Regional Center's specific standards such as code tables.

The following three logical databases will be dedicated to training in DevB:

- **Master database** – This instance will be the database that is used to populate user ID's, passwords, transactions for exercises, and other information that will be needed for the successful deployment of training. The Training Team will develop baseline data to be loaded into this database. This data will be structured to support the hands-on exercises and walk-through demonstrations developed for the training. This data will include information related to consumers and cases, provider information, fiscal information, and data that will support the printing of CADDIS reports. The baseline data will also include logins and passwords for all trainers and trainees. The IDs and passwords that training participants use will only be valid for accessing the Training Environment.

  The Master database will not be used during training. Rather, a copy of the Master will be used to refresh the other training databases, described below, between courses. The CADDIS Training Team will evaluate changes to the production environment and assess the impact on the training environment, training data, and training material. If necessary, this database will be updated to reflect changes to the production environment.

The Training Lead will work with the project Technical Architect to develop a comprehensive schedule so that the Training Environment can be updated with appropriate CADDIS code changes. The database will be updated using a code drop or Service Pack so that re-installation of baseline data will not be needed. After each refresh, the Technical Architect and Training Team will run tests to validate the integrity of the environment and baseline data for exercises. Once the training material is complete and Certified CADDIS Training begins, this database will only be updated if critical bugs are found that could impact the success of training delivery.

- **Certified CADDIS Training database** – This database will be the copy that is used for Certified CADDIS Training sessions. The Master database will be used to refresh the Certified CADDIS Training database at the end of each training session. This will restore the Certified CADDIS Training database to its original state. A refresh and "lock down" schedule will be included in the Final Plan. It is anticipated that each refresh will take 24 hours or less. After each refresh, the Technical Architect and Training Team will run tests to validate the integrity of the environment and baseline data for exercises.

- **CADDIS User Training database** – This database will mirror the Certified CADDIS Training database and will be used by the Certified CADDIS Trainers to conduct CADDIS User Training. Prior to CADDIS User Training for the Pilot and each Wave, the Training Team will request a CADDIS User Training schedule from each Regional Center and the number of participants for each course. Based on this information, the appropriate user ID's and passwords will be established for each Regional Center. In addition, Certified CADDIS Trainers will be taught how to establish user IDs and passwords in the event that more are needed once CADDIS User Training begins at each Regional Center.

A refresh and "lock down" schedule will be established that will not impact the Regional Center's training schedule. It is recommended that the Regional Centers schedule courses to be completed during a given week so that DevB can be refreshed each Friday night. It is anticipated that each refresh will take 24 hours or less.

Once training has been completed for all Regional Center and DDS staff, a final data refresh will be completed on the training environment and responsibility for the maintenance of this environment will transition to DDS technical staff.

2.3.7 CADDIS Sandbox Environment

Prior to Certified CADDIS Training a Sandbox Environment will be established. This environment can be used by trainees after they complete a course to practice what they have learned. At the end of each course, each trainee will be given a user ID and password for the Sandbox Environment.

The Sandbox Environment will be hosted at the HHSDC Data Center on the DevTest Physical Environment as logical environment DevC. DevC will be standardized and will not be configured for each Regional Center's specific standards such as code tables. DevC will incorporate all of the same features and functions of the CADDIS Training Environment (DevB). The baseline data developed to support the Training Environment will be copied from the DevB Master database to the Sandbox Environment. This data will allow users to practice the same exercises completed in training to refresh their memory or to try new exercises. Users will also be able to add data to the Sandbox Environment to replicate an activity required for their job in a safe environment. The Sandbox Environment will be not be refreshed until the completion of CADDIS User Training for Wave 3 so that users will not lose transactional data they have entered as they practice what they have learned. If DDS requests that the Sandbox be refreshed, they will need to inform the Regional Centers in advance that user transactional data will be lost.

3 Training Analysis

The training analysis phase further defines training courses and modules. During this phase, all course curriculum and content is finalized. The analysis phase has already been completed.

The Training Analysis phase included the following tasks:

- Review results of the GAP analysis.

- Review the CADDIS System Design deliverable.

- Conduct work sessions with CADDIS Implementation Team members to determine the appropriate curriculum for CADDIS user processes.

- Develop a detailed curriculum design and map the course curriculum to CADDIS recommended user groups/audiences for each course and module.

- Begin the assessment of appropriate training locations.

These tasks are described in more detail in the sections below.

3.1 Review Results of the GAP Analysis

The Training Team has reviewed the CADDIS GAP analysis documentation. This review allowed the team to further validate that the appropriate CADDIS processes will be included in the curriculum and training material. This review also helped to validate that current ShareCare processes are incorporated into the training curriculum and material as appropriate. During training material development, the Training Team will re-validate the course material against the GAP analysis documentation.

3.2 Review CADDIS System Design Deliverable

The Training Team has validated that the appropriate CADDIS end user processes are included in the training material. The Training Team reviewed the System Design deliverable to identify CADDIS processes that need to be conducted by end users. Not all system design will need to be incorporated into the CADDIS courses. For example, there will be numerous "behind the scenes" processes that will not be appropriate for CADDIS training. However, the review of System Design deliverable assisted the Training Team to identify process flows to help the end user understand how information they put into CADDIS fits into the "bigger picture." The Training Lead has already completed this analysis and has incorporated the review into the training curriculum that is part of this Plan.

3.3 Work Sessions with CADDIS Implementation Team

During the draft curriculum design process, the Training Lead conducted work sessions with the CADDIS Functional Leads. The purpose of these work sessions was to validate the curriculum and make necessary changes. During the training material design process, the Training Team met with the appropriate CADDIS Implementation Team members to develop detailed course outlines that are based on end user processes. This will continue to be an iterative process as the training material is developed. The Training Team will continue to meet with CADDIS Implementation Team members to review training material as it is developed. In addition, during the training material development process, the DDS Training Officer and DDS selected Regional Center Subject Matter Experts will review the training modules as they are developed. The DDS Training Officer will coordinate this review process with the Subject Matter Experts. This is discussed in more detail in *Section 5.1 – Training Material Quality Assurance and Testing*.

3.4 Curriculum Design and Mapping to Target Audiences

A training curriculum has already been validated with the Functional Area Leads and is included in *Appendix 1 – Certified CADDIS Training Curriculum* and *Appendix 2 – System Administration Training and Ad Hoc Report Training Curriculum*. The curriculum includes pre-requisites for Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training.

Once this Final Plan is reviewed and approved by DDS, the Training Lead will finalize the curriculum and mapping to the target audiences for CADDIS User Training. A sample mapping to CADDIS User target audiences is included in *Appendix 3 – Sample Mapping to Target Audiences*. It is intended that this curriculum will also be used for CADDIS User Training with potential reorganization by the Regional Centers based on user groups. Regional Centers can divide the course by appropriate process areas, user groups, and user levels.

The Certified CADDIS Training curriculum is intended to incorporate CADDIS processes as well as Presentation Skills tips and tricks in each course. Each course will include Presentation Skills teach-back sessions. All identified Certified CADDIS participants must attend the CADDIS 101 – Fundamentals course. It is strongly recommended that Regional Centers send at least one participant to all Certified CADDIS Training courses. Other Certified CADDIS Training participants may attend selected courses based on their area of expertise such as Service Coordination. These participants will then conduct CADDIS User Training at their Regional Center.

A list of the Certified CADDIS Training courses is included in *Table 2 – Certified CADDIS Training Courses* below.

CADDIS Course Number	Course Title	Estimated Course Length	Course Description
101	CADDIS Fundamentals	3 hours and 45 minutes.	This course will be conducted one time during the Pilot and each Wave of training using a web-based presentation. A maximum of 12 participants can attend this training in each identified training classroom. All other participants can attend this course via the Internet. The course will include a high-level demonstration of CADDIS processes and their integration with other CADDIS processes. It will also include an overview of navigation in CADDIS, an overview of System Administration activities such as workflow and alerts, and an overview of report sorting and printing. There will be no user exercises in this course. However, participants will be given the opportunity to practice navigation functions in subsequent courses. This course will set the foundation for the remaining courses by providing the key concepts for CADDIS. Participants must attend this course before attending any other Certified CADDIS Training courses.
201-A	Consumer Case Development	23 hours and 15 minutes (including navigation, lunch hours, breaks, wrap-up time, presentation skills, and Sandbox practice)	This course will provide hands-on practice of Consumer processes such as consumer profiles, eligibility and referrals, episodes and service periods, service planning and reviews, and assessments.

CADDIS Course Number	Course Title	Estimated Course Length	Course Description
201-B	Quality Assurance	9 hours (including navigation, lunch hours, breaks, wrap-up time, presentation skills, and Sandbox practice)	This course will provide an overview of Quality Assurance activities in CADDIS. Participants will learn the QA processes that apply to all QA activities and will learn how to enter Monitoring and Evaluation, Technical Assistance, Complaint, Rapid Response, Immediate Danger, and Corrective Action Plan information. These lessons will prepare the user to enter QA activity into CADDIS.
201-C	Resource Development	22.5 hours (including navigation, lunch hours, breaks, wrap-up time, presentation skills, and Sandbox practice)	This course will provide hands-on practice setting up a Provider structure. Participants will also learn how to conduct Provider searches, track applications, document appeals, create rates and contracts, and create transportation routes and requests.
201-D	Fiscal	22 hours and 30 minutes (including navigation, lunch hours, breaks, wrap-up time, presentation skills, and Sandbox practice)	This course will provide hands-on practice for CADDIS Fiscal activities. Participants will learn how to enter POS, Accounts Payable, Accounts Receivable and Consumer Trust Management information.

Table 2 – Certified CADDIS Training Courses

A list of the System Administration and Ad Hoc Report Training courses is included in *Table 3 – System Administration and Ad Hoc Reporting Training Courses* below.

CADDIS Course Number	Course Title	Estimated Course Length	Course Description
301-A	System Administration Training for DDS	18 hours (including lunch hours and breaks)	This course will include CADDIS System Administration functions that DDS and Regional Center System Administrators will perform.
301-B	System Administration Training for Regional Centers	18 hours (including lunch hours and breaks)	This course will include CADDIS System Administration functions that Regional Center System Administrators will perform.
302	Ad Hoc Report Training for DDS and Regional Centers	9 hours (including lunch hours and breaks)	This course will teach DDS and Regional Center report developers how to develop *ad hoc* reports using the Actuate tool.

Table 3 – System Administration and Ad Hoc Report Training Courses

3.5 Assessment of Appropriate Training Locations

The assessment of training locations has already begun. The DDS Training Officer has identified and contacted training locations for the pilot and first Wave of Certified CADDIS Training. The Training Lead will continue to work with the DDS Training Officer to secure and finalize training locations and logistics such as computers and classroom equipment. The Regional Centers are responsible for all activities related to CADDIS User Training locations and equipment.

If possible, Certified CADDIS Training will be held at Regional Centers in the five training locations identified below. The Training Team will continue to work with DDS to determine if there are appropriate classroom facilities at these Regional Centers. The Training Lead and DDS Training Officer will continue to work with the Regional Center Training Contacts to secure appropriate classrooms and equipment. Training classroom and equipment requirements are described in *Section 6.2.2 – Training Facilities Procurement and Site Preparation for Certified CADDIS Training* through *Section 6.2.6 – Classroom Preparation by the Trainers*.

Table 4 – Proposed Certified CADDIS Training Locations below lists the proposed locations for the Certified CADDIS Training courses. These locations will be confirmed no later than September 30, 2003 and will be documented in the Updated Training Plan that is due on October 24, 2003.

Certified CADDIS Training	Training Location	Status of computer availability	Status of equipment availability
Pilot Training – Session One	Inland Regional Center – site confirmed	13 per classroom – Computer equipment currently under evaluation for required needs. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.
Pilot Training – Session Two	Valley Mountain Regional Center – site confirmed	Computer equipment currently under evaluation by DDS for required needs. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation by DDS for required needs. The deadline for confirmation is 08/29/03. DDS is responsible for the computer and equipment needs for training at Valley Mountain Regional Center.
Wave 1 – Sacramento Location	Alta Regional Center – site to be confirmed	Computer equipment currently under evaluation for required needs. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.
Wave 1 – Central California Location	Central Valley Regional Center – site confirmed	Can add computers to current training rooms to meet needs. The Training Team will validate that the computers meet requirements by 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.

Certified CADDIS Training	Training Location	Status of computer availability	Status of equipment availability
Wave 2 – Bay Area Location	East Bay Regional Center- site to be confirmed	Computer equipment currently under evaluation for required needs. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.
Wave 2 – Southern California Location	San Gabriel/ Pomona Regional Center – site to be confirmed	Preliminary assessment indicated that computers would be available. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.
Wave 3 – Southern California Location	Harbor Regional Center – site to be confirmed	Computer equipment currently under evaluation for required needs. The deadline for confirmation is 08/29/03.	Equipment availability currently under evaluation for required needs. The deadline for confirmation is 08/29/03.

Table 4 – Proposed Certified CADDIS Training Locations

4 Training Design

The training design phase forms the link between the analysis phase and the actual development of the CADDIS training material. Activities during this phase include the following:

- Design course material contents with a similar "look and feel."

- Design additional course material for Certified CADDIS Trainers.

- Develop detailed course outlines and descriptions.

- Assist Regional Centers in identifying Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training participants.

4.1 Design Course Material Contents

All course material should follow a consistent structure and format, or "look and feel." This will create a sense of CADDIS branding for the material and will maintain consistency throughout the material. A template will be created for the course material that will include course objectives, course overviews, module objectives, module overviews, lessons, hands-on exercises, and mastery evaluations. In addition, decisions will be made regarding the font, font size, headers and footers, use of icons and pictures, and page numbering. This structure will allow all instructors to use the same classroom delivery approach during CADDIS User Training.

The Certified CADDIS Training and CADDIS User Training course material contents are listed below with a description of how they can be used in the classroom:

- **Course Introduction and Objectives Review** – The instructor will outline the primary objectives and expectations of the course. The instructor will explain the importance of the CADDIS training course and allow for any general questions that the trainees might have. For example, in the Fiscal Course, the instructor will review the objectives for learning the CADDIS Fiscal processes. The instructor will also review current terminology versus new terminology in CADDIS that may be new to the participants.

- **Review of Course Modules –** Once the course introduction and objectives review is complete, the instructor will then review the modules relevant to that particular course. These modules will be covered one-by-one throughout the remainder of the training session. For example, in the Fiscal course, the instructor will provide a high-level review of the modules that are part of the CADDIS Fiscal processes such as Accounts Payable, Accounts Receivable, and General Ledger.

- **Delivery of Modules –** Each course module will be delivered in the following manner:

  o **Review of Module Objectives** – The instructor will review the objectives of a particular module with the trainees. Much like the general overview of the course, the instructor will go over the primary objectives to be accomplished upon completion of the module. For example, one module in the Fiscal Course will focus on Accounts Payable. The instructor will detail the objectives for the Accounts Payable module such as entering Check Issuance, Check Processing, and Overpayments.

  o **Lesson-Instructor Demonstration of a Specific Process Within the Module –** The instructor will demonstrate a specific process in CADDIS. For example, in the Accounts Payable module, the instructor will demonstrate how to issue a check in CADDIS. This walkthrough will be supplemented by training material that explains the flow of information for the particular process.

- o **Exercises –** Once the trainees have seen the demonstration, they will be given a chance to apply their knowledge and learn more about CADDIS by practicing the process in the CADDIS Training Environment. During the course, the Trainer will monitor the exercises to validate that the correct information is entered by the participants. Additional exercises will be developed that participants can use to practice what they have learned in the Sandbox Environment after attending the training. The exercise material will be developed using the CADDIS test scripts. The course material will include specific instructions and scenario information to accomplish each exercise.

- o **Module Summary, Questions & Answers –** After all the lessons and exercises for a module have been completed, the instructor will present a module summary. The instructor will review the module and the key concepts that were covered in the module. Once the review session is complete, the trainer will address CADDIS-related questions and areas needing clarification. DDS and Regional Center policy and process questions will be noted and forwarded to DDS for a response if there is not an appropriate DDS or Regional Center Subject Matter Expert in the class.

- **Course Summary and Questions & Answers –** Upon completion of all course modules, there will be a class wrap up to summarize the key points of the course. This section of the training will include instructor led discussion and demonstrations as needed. This section will also include additional tips and tricks, if appropriate, for the participants.

- **Course Mastery Evaluation –** The Course Mastery Evaluation will be another hands-on exercise that includes key components of the course. The course material will be similar to the hands-on exercises and will include specific instructions and scenario information to accomplish the evaluation. The purpose of the Mastery Evaluation is to validate that the participants understand how the course modules and processes link together. The mastery evaluation will take place at the end of each course (such as CADDIS 201-B Quality Assurance) during the Additional Exercise time. This will be an open-book evaluation and the student will be allowed to use the training material and User Manual as references. During Certified CADDIS Training, the instructor will monitor each student's progress and report to the DDS Training Officer if a student lacks sufficient knowledge to successfully train others on the functionality. If students are successful with the majority of the functions but struggle with one or two, the instructor will suggest that the student practice those exercises again prior to CADDIS User training. The Certified CADDIS Trainers may also use the mastery evaluation during CADDIS User training. The Regional Center Certified CADDIS Trainers are responsible for monitoring the success of students during CADDIS User Training. If a student does not successfully complete the Mastery Evaluation, the trainer may choose to spend additional time with the student to review the CADDIS functionality that the student needs assistance learning. The Regional Centers may also choose to provide a classroom "lab" with a tutor for students to continue to practice what they learned. Regional Centers may also provide one-on-one tutoring for students who did not successfully complete the exercises or mastery evaluation or may assign a peer coach when they return to their normal duties who can assist them during their transition.

- **Course/Instructor Evaluations –** The trainees will be given the opportunity to provide feedback through a course evaluation. The evaluations will allow the trainees to rate certain components of the training course they recently completed as well as to include general comments about their overall learning experience. During the delivery of Certified CADDIS Training, the results of these evaluations will be used to identify areas of the CADDIS training program in need of improvement. The Regional Centers can also use these evaluations during CADDIS User

Training to monitor the success of training. The evaluation of CADDIS training is further discussed in *Section 7 – Training Evaluation*.

The course format outlined above will be especially helpful during CADDIS User Training. These participants may need more time for course introductions, expectations setting, and an overview of related processes that they may not learn during the particular course they are taking. A sample Participant Guide for a CADDIS training course is included in *Appendix 4 – Sample Participant Guide for CADDIS Training*. This sample is intended to provide a suggested "look and feel" for the material.

4.2 Design Additional Course Material for Certified CADDIS Training

Additional training material will be developed for CADDIS Certified Training. Participants will be provided with instructor material that will assist them in successfully conducting CADDIS User Training. This material will include demonstration material to be used for the Instructor-Led demonstrations in each module, and solutions to classroom exercises and mastery evaluations if appropriate.

Presentation skills material will also be designed and may be used by Certified CADDIS Trainers as reference material. This material will include effective instructor approaches to teaching, dealing with difficult trainees, answering questions effectively, and other skills that are valuable for instructor-led teaching. This material will be provided and presented during the Certified CADDIS Training courses. Each course will include time for teach-back sessions so participants can practice their presentation skills.

Classroom logistics material will be designed for Certified CADDIS Training that will include instructions on appropriate classroom set-up, material needed for the course and classroom, instructions on accessing the Training Environment, and how to reach the CADDIS Help Desk.

4.3 Develop Detailed Course and Module Descriptions

During course design, detailed course and module descriptions will be developed. These will be provided to DDS to be used as communication material when preparing for and announcing Certified CADDIS Training. The descriptions will include a high-level overview of the course, course objectives, a list of course modules, module details, suggested target audiences, course pre-requisites, and course length. *Appendix 5 – Sample Course Outline* includes a sample course outline. In addition, the Training Team has provided DDS with the Presentation Skills material that will be included during Certified CADDIS Training.

4.4 Assist Regional Centers in Identifying Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training Participants

Once the design phase is completed and the course curriculum and descriptions have been finalized, DDS can forward this material to the Regional Centers with instructions to identify Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training participants. Each Regional Center will be allowed to send a minimum of 4 staff to Certified CADDIS Training. A final decision on the number of participants from each Regional Center will be made by DDS and the Training Lead, and will depend on a number of factors, including the number of Regional Center user staff to be trained and the number of Regional Centers per Certified CADDIS Training host site. However, class size for each Certified CADDIS Training Session will not exceed 12 participants. The Regional Centers will make the final decision on the staff who are selected to attend. This decision will be based on the participant's match with the requirements listed in *Section 4.4.1 – Recommendations for Certified CADDIS Training Participants*.

Two technical staff members from each Regional Center and DDS will need to be selected to attend System Administration Training. Recommendations for participants in the System Administration Training are included in *Section 4.4.2 – Recommendations for System Administration Training Participants*.

Up to twelve participants from DDS and each Regional Center will need to be selected to attend Ad Hoc Report Training. Recommendations for participants in the Ad Hoc Report Training are included in *Section 4.4.3 – Recommendations for Ad Hoc Report Training Participants*.

A deadline will be communicated to the Regional Centers so that training participants are identified in a timely fashion prior to training. This communication will occur in an iterative process to coincide with the training dates. The Training Lead and DDS Training Officer will provide guidance to the Regional Centers as they identify training participants. This will help the Regional Centers select the appropriate staff for the training. The DDS Training Officer will also assist Regional Centers as needed in identifying the appropriate user groups for CADDIS User Training. Once the lists of participants for Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training have been finalized, the DDS Training Officer will communicate with the Regional Centers regarding the training schedule and other logistics.

4.4.1 Recommendations for Certified CADDIS Training Participants

The Certified CADDIS Training participants will be required to achieve the Roles and Responsibilities listed in *Section 9.4 – Certified CADDIS Trainer Roles and Responsibilities*. In addition, Certified CADDIS Training participants must meet the following criteria to be effective learners and CADDIS User Trainers. The Regional Centers are responsible for using the criteria to prepare identified participants for Certified CADDIS Training:

- Have a general understanding of the purpose and capabilities of CADDIS based on communications from DDS and their Regional Center prior to the deployment of CADDIS.

- Have an overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area.

- Have an understanding of Regional Center and office specific business processes and procedures.

- Have strong knowledge and experience in their specific functional area (e.g., Fiscal, Resource Development, and Service Coordination).

- Successful completion of the DDS CDER and/or Early Start training for Service Coordinators.

- Be knowledgeable of the current legacy systems.

- Have a willingness to learn and teach CADDIS.

- Be available to attend the CADDIS 101 – Fundamentals course via a web-based presentation and their Regional Center assigned Certified CADDIS Training course(s).

- Be available to conduct CADDIS User Training prior to their Region Center's go-live date.

- Be available during system implementation and go-live at their Regional Center to assist staff in using CADDIS.

- Be willing to use presentation skills that meet the needs of their CADDIS User Training audience. This includes skills they already possess and those they may learn during Certified CADDIS Training.

- Have an understanding of the established DDS protocol for contacting the Help Desk.

- Have a strong understanding of Microsoft Windows applications including experience and comfort using computers in an Internet Explorer 5.5 environment. The minimum PC literacy standards include:

  o The ability to use and manipulate a mouse including double-clicking, pointing and clicking, pointing and dragging, and right-clicking.

  o The ability to resize pages and work with multiple pages.

  o The ability to open and close Windows, and navigate through text boxes.

  o A basic understanding of the keyboard and location of keys.

  o The ability to open and select values from drop-down menus and radio buttons.

  o The ability to use toolbars, menus and task bars including "Favorites".

  o A basic understanding of Internet terminology (i.e. URL, links).

  o A basic understanding of Internet navigation commands (e.g., launch Internet Explorer) and icons including "Back," "Forward," "Stop," "Refresh," and "Search".

4.4.2 Recommendations for System Administration Training Participants

System Administration Training participants must meet the following criteria. The Regional Centers are responsible for using the criteria to prepare identified participants for the training.

- Have a general understanding of the purpose and capabilities of CADDIS based on communications from DDS and their Regional Center prior to the deployment of CADDIS.

- Have an overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area.

- Have an understanding of Regional Center and office specific business processes and procedures.

- Have strong knowledge and experience in their current System Administration functions.

- Be knowledgeable of the current legacy systems.

- Have a willingness to learn and teach CADDIS System Administration functions to others at their Regional Center or DDS.

- Be available to attend the on-site System Administration Training.

- Be available during system implementation and go-live at their Regional Center to assist staff in using the CADDIS system administration functions if needed.

- Have an understanding of the established DDS protocol for contacting the Help Desk.

- Have a strong understanding of Microsoft Windows applications including experience and comfort using computers in an Internet Explorer 5.5 environment. The minimum PC literacy standards include:

  o The ability to use and manipulate a mouse including double-clicking, pointing and clicking, pointing and dragging, and right-clicking.

  o The ability to resize pages and work with multiple pages.

- o The ability to open and close Windows, and navigate through text boxes.

- o A basic understanding of the keyboard and location of keys.

- o The ability to open and select values from drop-down menus and radio buttons.

- o The ability to use toolbars, menus and task bars including "Favorites".

- o A basic understanding of Internet terminology (i.e. URL, links).

- o A basic understanding of Internet navigation commands (i.e. launch Explorer) and icons including "Back," "Forward," "Stop," "Refresh," and "Search".

4.4.3 Recommendations for Ad Hoc Report Training Participants

Ad Hoc Report Training participants must meet the following criteria. The Regional Centers are responsible for using the criteria to prepare identified participants for the training:

- Have a general understanding of the purpose and capabilities of CADDIS based on communications from DDS and their Regional Center prior to the deployment of CADDIS.

- Have an overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area.

- Have an understanding of Regional Center and office specific business processes and procedures.

- It is recommended that participants have experience in their current report build processes. Understanding the current processes will help the participant because they will only be learning how to use the new *ad hoc* tool, not the Regional Center's current processes and how those current processes are applicable.

- Have a willingness to learn and teach CADDIS *ad hoc* report functions to others at their Regional Center or DDS.

- Be available to attend the on-site Ad Hoc Report Training.

- Be available during system implementation and go-live at their Regional Center to assist staff in using the CADDIS *ad hoc* report functions if needed.

- Have an understanding of the established DDS protocol for contacting the Help Desk.

- Have a strong understanding of Microsoft Windows applications including experience and comfort using computers in an Internet Explorer 5.5 environment. The minimum PC literacy standards include:

- o The ability to use and manipulate a mouse including double-clicking, pointing and clicking, pointing and dragging, and right-clicking.

- o The ability to resize pages and work with multiple pages.

- o The ability to open and close Windows, and navigate through text boxes.

- o A basic understanding of the keyboard and location of keys.

- o The ability to open and select values from drop-down menus and radio buttons.

- o The ability to use toolbars, menus and task bars including "Favorites".

- o A basic understanding of Internet terminology (i.e. URL, links).

- o A basic understanding of Internet navigation commands (i.e. launch Explorer) and icons including "Back," "Forward," "Stop," "Refresh," and "Search".

5 Training Development

Once the training design phase has been completed material development will begin. The Training Team will work closely with the CADDIS Implementation Team to validate that the material accurately reflects the user processes developed in CADDIS. Regional Center staff may also be contacted to provide clarification to process changes and to review training material. The Training Team will produce material module by module and hand them off to the Quality Assurance process on a flow basis. They will continue developing subsequent modules during the review process and correct errors and make modifications once reviews are completed. The DDS Training Officer will coordinate with Regional Center Subject Matter Experts in the completion of these iterative reviews. These iterations will continue until all training material is complete and can be handed off in its entirety for final DDS review and approval. Activities during the development phase include the following:

- Conduct Quality Review and testing of the training material.

- Compile all training material into Participant and Instructor Guides.

5.1 Training Material Quality Assurance and Testing

Quality Assurance is a critical component of the material development process and the success of the CADDIS training program. A Quality Assurance approach has been developed to guide the review and testing for all training material.

The objectives of the Quality Assurance Approach are as follows:

- Establish a consistent and methodical process to monitor quality during training material development.

- Confirm that each training course and module is consistent in design.

- Validate that training material matches the required curriculum.

- Identify and resolve quality assurance problems quickly.

- Provide the appropriate project staff with the opportunity to review the material.

To achieve these objectives, a detailed Quality Assurance review process has been established. *Figure 3 – Training Quality Review Steps* below shows the steps that will be followed to help validate that all appropriate project members have input into the training material.

Training Material Quality Assurance Process Flow
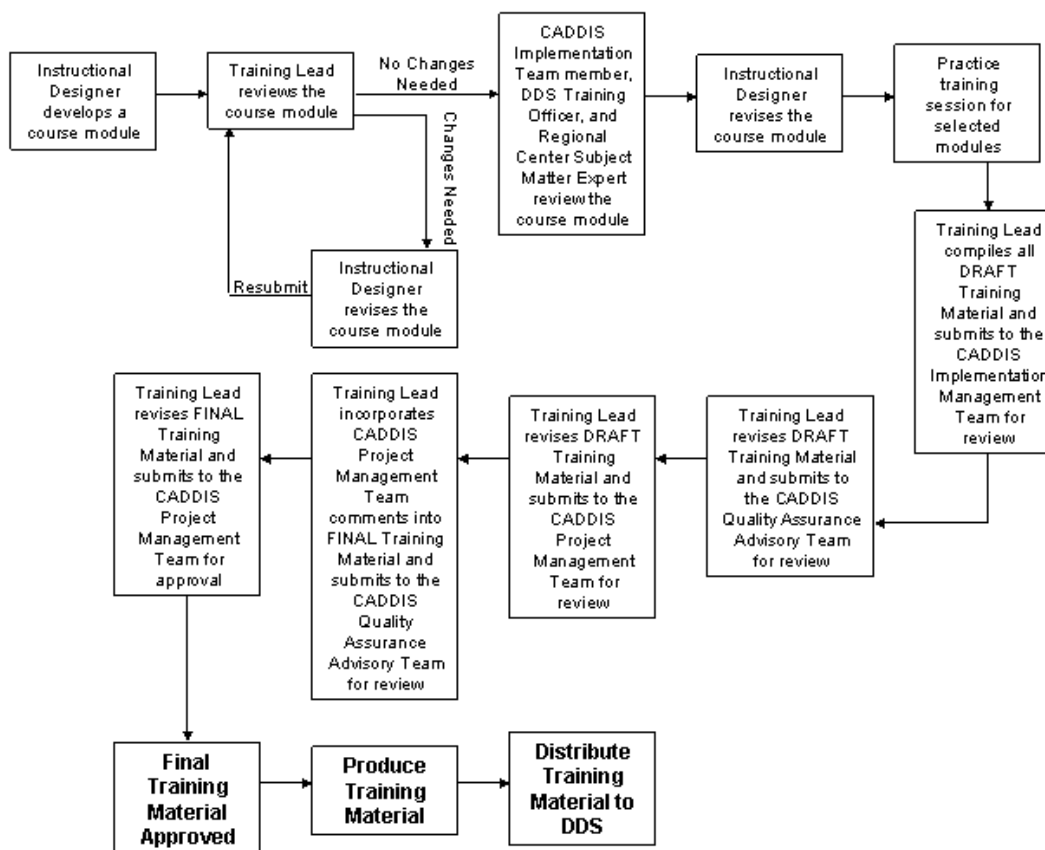
Figure 3 – Training Quality Assurance Review Steps

The details for each step of the Quality Assurance review process are outlined in _Table 5 – Training Quality Assurance Review Details_ below.

QA Step	Description	Procedure	Dependencies
Step One: The Training Lead performs a Quality Assurance review of each course module and exercise as it is completed.	The Instructional Designer will create course modules based on the CADDIS course curriculum. As each module is completed, it will be given to the Training Lead for review. This process will continue for each	The Instructional Designer will forward a soft copy of each module to the Training Lead. The Training lead will review the material for quality and consistency and will note needed changes on the soft copy in "Track Changes" mode. The Training Lead will then return the material to the Instructional Designer for	Completion of a draft course module by the Instructional Designer

QA Step	Description	Procedure	Dependencies
	module as it is developed. The Training Lead will test each exercise in the Training Environment once it is available.	needed revisions. This will be an iterative process until the Training Lead is satisfied that the module is ready for CADDIS Implementation Team member review. If necessary, the Instructional Designer will load necessary data into the Training Environment once it is available for the Training Lead to use when testing each exercise.	
Step Two: The appropriate CADDIS Implementation Team member, DDS Training Officer, and DDS selected Regional Center Subject Matter Experts perform a Quality Assurance review of each course module and exercise.	The Instructional Designer will forward each course module and corresponding exercises to an appropriate CADDIS Implementation Team member and the DDS Training Officer for review. The Implementation Team member and DDS Training Officer will have 48 hours to review the material and provide feedback. This process will continue until the appropriate CADDIS Implementation Team member and the DDS Training Officer have reviewed all the course modules.	The Instructional Designer will forward a soft copy of each module to the appropriate CADDIS Implementation Team member and the DDS Training Officer. The CADDIS Implementation Team member will be chosen based on their CADDIS knowledge of the specific material that needs to be reviewed. The CADDIS Implementation Team member and DDS Training Officer will review the material for functional accuracy and consistency. The DDS Training Officer will also forward the material to DDS selected Regional Center Subject Matter Experts to review the material during the same 48 hour timeframe. The Subject Matter Experts will return the reviewed material to the DDS Training Officer who will compile and submit them to the Instructional Designer. The DDS Training Officer will	Completion of quality assurance review for a course module by the Training Lead. Completion of changes to the course modules by the Instructional Designer.

QA Step	Description	Procedure	Dependencies
		coordinate the review process with the selected Subject Matter Experts and will provide them with a review schedule in advance of the review process. The CADDIS Implementation Team member and DDS Training Officer can make changes either to the soft copy in "track changes" mode or may write the changes on a hard copy of the material. After the review is completed, the CADDIS Implementation Team member and DDS Training Officer will return the compiled soft or hard copy changes to the Instructional Designer who will then make the necessary changes to the material.	
Step Three: The Training Lead coordinates a training module practice session.	After review of the curriculum in the Plan, DDS has selected the following six modules to be tested in a "classroom environment:" • 201A - Consumer Case Development – Assessments • 201A - Consumer Case Development - Waiver Tracking • 201B - Quality Assurance - QA Monitoring and Evaluations • 201C - Resource Development - Provider Programs and Capacity Management - Part Two	The Training Lead will schedule and coordinate internal practice sessions to review the six training modules listed in a "classroom" environment. These internal practice sessions will occur on 10/15/2003. Attendees will include the CADDIS Project Management Team, the DDS Training Officer and 2-6 DDS staff members.	Completion of quality assurance review for a course module by a CADDIS Implementation Team member, DDS Training Officer, and DDS selected Regional Center Subject Matter Experts.

QA Step	Description	Procedure	Dependencies
	• 201D - Fiscal - Consumer Trust Management • 201D - Fiscal - Provider Authorizations.		
Step Four: The CADDIS Quality Assurance Advisory Team performs an Internal Quality Assurance Review of Draft Training Material	The Training Lead will forward all training material and exercises to the CADDIS Quality Assurance Advisory Team for review.	The Training Lead will forward a soft copy of the training material to the CADDIS Quality Assurance Advisory Team. The Quality Assurance Advisory Team will review the material for quality and consistency. The CADDIS Quality Assurance Advisory Team will make all changes or comments to the soft copy in "Track Changes" mode. After the CADDIS Quality Assurance Advisory Team has completed a review, they will return the soft copy to the Training Lead. The Instructional Designer will then make the necessary changes to the material.	Completion of changes to all course material by the Instructional Designer.
Step Five: Draft Training Material is submitted to the CADDIS Project Management Team for review	The Training Lead will forward all training material and exercises to the CADDIS Project Management Team for review.	The Training Lead will provide both soft and hard copies of the draft training material to the CADDIS Project Management team. The CADDIS Project Management Team will review the material and provide feedback in the format that is standard to all project deliverables.	Completion of quality assurance review for all Draft course material by the CADDIS Quality Assurance Advisory Team. Completion of changes to all course material by the Instructional Designer.
Step Six: Draft Training Material is	The Instructional Designer will make final changes to the	The Training Lead will review all feedback from the CADDIS Project	Completion of quality assurance review for all Draft course

QA Step	Description	Procedure	Dependencies
revised and finalized.	material based on feedback from the CADDIS Project Management Team.	Management Team and will work with the Instructional Designer to incorporate the necessary changes into the training material.	material by the CADDIS Project Management Team.
Step Seven: The CADDIS Quality Assurance Advisory Team performs an Internal Quality Assurance Review of Final Training Material.	The Training Lead will forward the Final training material and exercises to the CADDIS Quality Assurance Advisory Team for review.	The Training Lead will forward a soft copy of the Final training material to the CADDIS Quality Assurance Advisory Team. The Quality Assurance Advisory Team will conduct a final review of all material. The CADDIS Quality Assurance Advisory Team will make any changes or comments to the soft copy in "Track Changes" mode. After the CADDIS Quality Assurance Advisory Team has completed the final review, they will return the soft copy to the Training Lead. The Instructional Designer will then make the necessary changes to the material.	Completion of Final revisions to the training material.
Step Eight: Final Training Material is submitted to the CADDIS Project Management Team for review and approval	The Training Lead will submit the final training material to the CADDIS Project Management Team for final review and approval.	The Training Lead will provide both a soft and hard copy of the final training material to the CADDIS Project Management team.

The CADDIS Project Management Team will review the material and provide feedback in the format that is standard to all project deliverables. | Completion of quality assurance review for all Final course material by the CADDIS Quality Assurance Advisory Team.

Completion of final changes to all course material by the Instructional Designer. |

Table 5 – Training Quality Assurance Review Details

A Training Material Development Status document will be developed that will be similar to the System Design Status document that was used during system design. This will allow the Training Lead to monitor and communicate the status of all training material development efforts. Deadlines will be set for the development and review of each course module. In addition, meetings and work sessions with the

CADDIS Implementation Team and CADDIS Project Team may be scheduled if information is needed to assist with the training design process.

During the development of training material, changes to the system design for CADDIS functions will be communicated to the Training Lead. The Training Lead will coordinate with the development team to receive this communication in a timely fashion.

5.2 Participant and Instructor Training Guides

Once training material has been completed, reviewed, and tested, it will be compiled into Participant and Instructor Guides. The Guides will include a preface, the course outline, the course overview, and sections for each training module including module objectives and overviews, lesson objectives and overviews, and exercises. The Guides will also include a mastery evaluation, additional exercises, and a course evaluation. The Instructor Guide will be developed for use during classroom training to assist the instructor in teaching the class. This Guide will be distributed to the Certified CADDIS Training Instructors and the Certified CADDIS Training participants. The Instructor Guide will contain all the components in the Participant Guide with the following additions: instructor lesson and demonstration notes and presentation skills material including classroom logistics, adult learning techniques and instructions for accessing the Training Environment.

6 Training Delivery

This section of the Plan discusses the following training delivery activities:

- training material distribution,

- training deployment planning, and

- finalizing the training schedule and locations.

6.1 Training Material Distribution

Prior to the start of Certified CADDIS Training, DDS will be provided with a soft and hard copy of all training material. DDS will be responsible for making the appropriate number of training material copies for each Certified CADDIS Training session. DDS will also be responsible for producing soft copies of the material for reproduction by the Regional Centers for CADDIS User Training. DDS may choose to provide soft copies on CDs or to post the material to the CADDIS website.

The training material will be distributed by the Instructors at the beginning of each Certified CADDIS Training session. The Training Team is responsible for changes to training material prior to the final CADDIS implementation wave. DDS and the Regional Centers will assume responsibility for managing and updating the training material upon completion of Certified CADDIS Training for the final CADDIS implementation Wave.

6.2 Training Deployment Planning

Detailed planning of training delivery should occur early in the training development process. This will validate that each training class is successful and the instructor has the resources necessary to conduct Certified CADDIS Training. Training facilities that have the appropriate size and equipment will be secured. Classrooms will also need to be prepared prior to training to validate that all material and equipment is ready for training. More details regarding appropriate deployment of training are discussed in the following sections.

6.2.1 CADDIS User Pre-requisites

Prior to user training, Regional Centers should validate that their end-users meet the following basic requirements before attending CADDIS User Training that is provided by the Certified CADDIS Trainers. DDS should forward these pre-requisites to the Training Coordinators at each Regional Center so they can prepare their staff for CADDIS User Training.

- Have a general understanding of the purpose and capabilities of CADDIS based on communications from DDS and Regional Center staff prior to the deployment of CADDIS User Training.

- Have an overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area.

- Have an understanding of Regional Center and office specific business processes and procedures.

- Be knowledgeable and experienced in their job duties.

- Successful completion of the DDS CDER and Early Start Training for Service Coordinators.

- Have general PC literacy skills including an adequate level of experience and general comfort using computers in a Microsoft Windows and Internet Explorer 5.5 environment. The minimum PC literacy standards should include:

   o The ability to use and manipulate a mouse including double-clicking, pointing and clicking, pointing and dragging, and right-clicking.

   o The ability to resize pages and work with multiple pages.

   o The ability to open and close Windows, and navigate through text boxes.

   o A basic understanding of the keyboard and location of keys.

   o The ability to open and select values from drop-down menus and radio buttons.

   o The ability to use toolbars, menus and task bars.

   o A basic understanding of Internet terminology (i.e. URL, links).

   o A basic understanding of Internet navigation commands (i.e. launch Explorer) and icons including "Back," "Forward," "Stop," "Refresh," and "Search."

6.2.2 Training Facilities Procurement and Site Preparation for Certified CADDIS Training

The Training Team is responsible for securing all training facilities for Certified CADDIS Training except the Valley Mountain Regional Center pilot Certified CADDIS Training, which is the responsibility of DDS. The Team will work closely with DDS and Regional Centers to finalize and prepare these sites. Each Regional Center will be responsible for obtaining CADDIS User Training facilities. However, the information in this Plan can be forwarded by DDS to the Regional Centers so they can identify appropriate classrooms and equipment for CADDIS User Training.

The Training Lead and DDS Training Officer have already started the process of surveying Regional Centers to determine if existing classrooms are available and large enough to accommodate Certified CADDIS Training. The Certified CADDIS Training sites will be prepared by the Training Team with assistance from Regional Center staff if the training is conducted at the Regional Center. Training facilities and all classrooms should be selected within a secure environment that can be locked at the end of each day. Each Regional Center will be responsible for notifying DDS of any individuals who may have special needs relative to the training facilities.

The Training Team will need access to fully equipped classrooms for one to two days the week before training begins in order to test and resolve any issues with the equipment and connectivity. The Training Team will confirm classroom availability with the host Regional Centers for these activities. This will be confirmed no later than September 30, 2003 which is the due date for confirming training locations.

Figure 4 – Preferred Classroom Layout below shows a diagram of the preferred classroom layout. Actual classroom set up may vary between and within facilities.
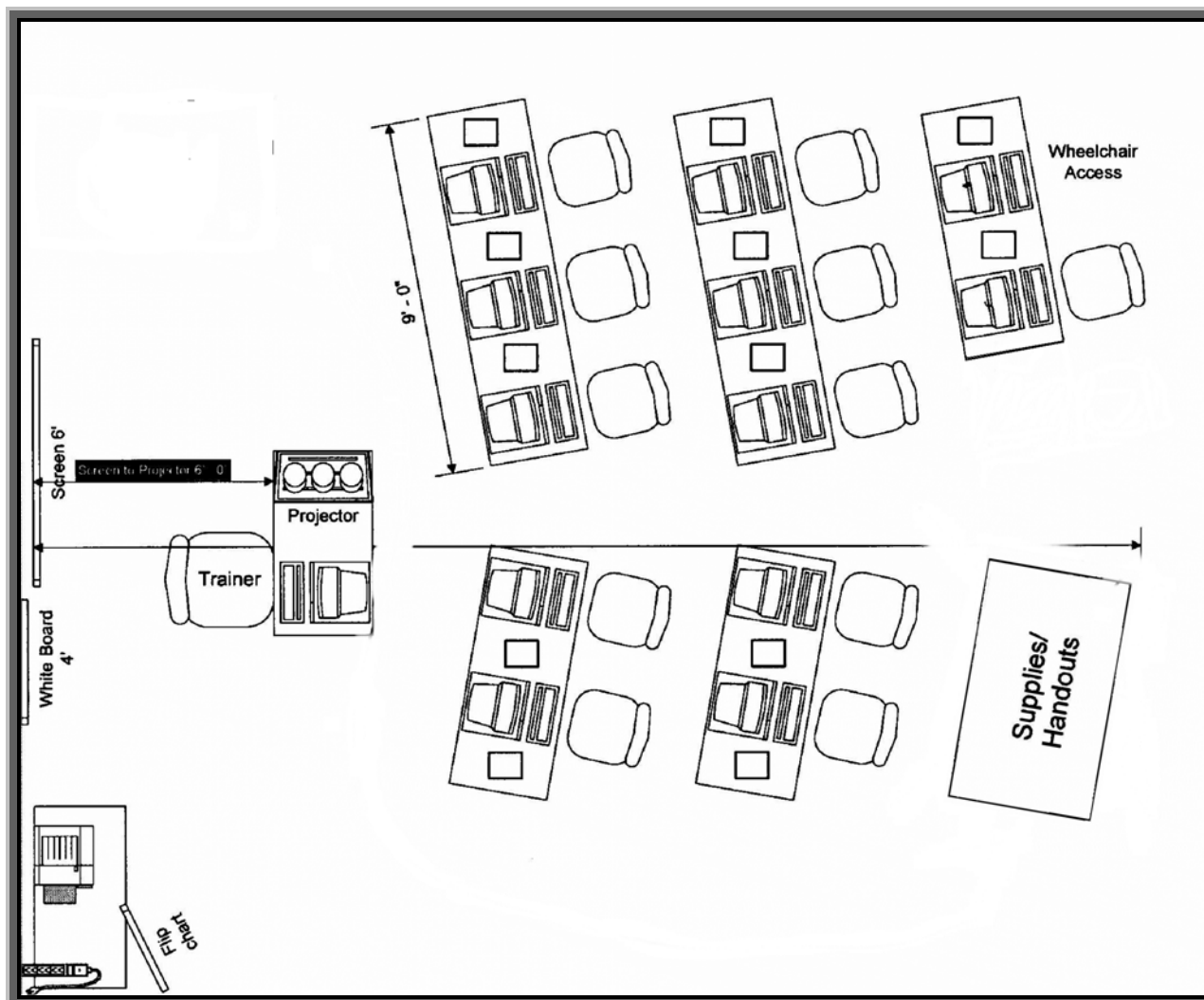
Figure 4 – Preferred Classroom Layout

6.2.3 Classroom Requirements

The Training Team is responsible for securing classrooms that meet the following minimum requirements. Every effort will be made to secure classrooms at Regional Centers. If Regional Center classrooms are not available, the Training Team is responsible for securing classrooms at other locations and paying for the cost of classroom rentals.

- A minimum of two separate classrooms large enough to accommodate 13 occupants (12 trainees and 1 instructor).

- A sufficient number of chairs and desks/tables for all participants, including a table for supplies and training material. The trainee desks should be large enough for a PC and training material.

- Sufficient open space for instructors to move throughout the classroom and assist trainees.

- Sufficient space so that all participants can view information projected on a screen.

- Sufficient distance from the screen to the last row of seats (should not exceed six screen-widths).

- Sufficient distance from the front row seat to the projection screen (should be at least the width of the screen to prevent discomfort or fatigue).

- Sufficient distance to the left and right of the projection screen (participants should not be seated more than one screen-width to the left or right of the screen).

- The screen should have enough elevation to be seen by the last row of participants.

- Classrooms will need equipment such as a Polycom telephone for the CADDIS 101 – Fundamentals course.   The equipment must allow off-site and in-class participants to hear the instructor.

- Classrooms should have connectivity to the Internet for 13 computers. If the training is held at a Regional Center, Regional Center staff must provide classrooms that have intranet connectivity to HHSDC. There should be T1 or faster connectivity to the Internet.

- There should be access to a water fountain or cooler.

- There should be access to nearby restrooms in sufficient number to accommodate the trainees within a 15 minute break time frame.

- There should be window blinds if ambient light will prevent projector viewing.

- There should be adjustable lighting (front dimmer switches) to provide sufficient illumination while information is projected on the screen.

- There should be sufficient heating/air conditioning systems to create a comfortable learning environment.

- Access to the training site by instructors should be available outside of normal business hours (nights and weekends). The Training Team will confirm that this access is available no later than September 30, 2003 which is the due date for the confirming the training locations.

- There should be access for trainees with special needs, such as wheelchair access.

- There should be adequate parking for all training participants. Alternate or public transportation will also be considered, such as nearby bus stops or MUNI/BART for Bay Area locations.

- There should be a secure space to store material.

- There should be sufficient electrical outlets and surge protectors for PCs and other equipment. Room power supply should be adequate to support the power needs of 13 PCs, a projector, printer, and other needed equipment.

6.2.4 Classroom Supplies and Equipment

The Training Team is responsible for securing appropriate equipment if it is not available at the training site. The following supplies and equipment will be needed for each classroom:

- a trash can in each room,

- course signage on the classroom door,

- a contact person name and phone number for site emergencies and network problems,

- a flipchart, easel, and tape,

- participant name tents,

- a whiteboard, markers, and erasers,

- a projection screen,

- a printer that is compatible with the instructor's computer,

- an InFocus (Proxima or similar) projector compatible with the pixel size of CADDIS screens for full display of the screens, and

- extension cords (if needed).

6.2.5 Equipment Needs

Certified CADDIS Training will require equipment that supports access to the CADDIS Training Environment. If host Regional Centers do not have the required computers, the Training Team will be responsible for obtaining the required equipment and paying the cost of renting the equipment, with the exception of the equipment for Valley Mountain Regional Center which will be the responsibility of DDS.

Each classroom must have 13 computers that will meet the following minimum requirements:

- Windows 95 or later operating system,

- minimum 400 MHz CPU,

- minimum 128 MB RAM,

- minimum 8 GB Disk Storage,

- minimum of 800 X 600 monitor resolution (although 1024 X 768 is recommended to reduce scrolling on the screens),

- Internet Explorer 5.5 or later,

- cookies enabled,

- SSL encryption enabled, and

- Ethernet NIC Connection (10/100 Base-T or TX NIC).

6.2.6 Classroom Preparation by the Trainers

Prior to each Certified CADDIS Training session the trainer will complete the following tasks:

- Verify that all classroom, supply, and equipment requirements have been met and are in place.

- Verify that the required training material is available in sufficient number for the course participants.

- Make a sign-in sheet available.

- Test each computer for connectivity to the Training Environment.

- Connect the Proxima to the instructor computer.

- Connect the printer to the instructor computer.

All of the requirements above have been captured in a Training Classroom Certification Checklist. This checklist will be used by DDS and the CADDIS Training Team to determine if targeted Regional Centers have the needed training. This checklist will also be used during site preparation prior to each Certified

CADDIS Training session. *Appendix 6 – Training Classroom Certification Checklist* includes this checklist.

6.3 Training Schedule and Locations for Certified CADDIS Training

Based on the CADDIS implementation schedule, the proposed training dates, participant schedule, and locations for the Pilot and Waves 1-3 are listed in *Section 6.3.1 – Pilot Certified CADDIS Training Participant Schedule* through *Section 6.3.4 – Wave Three Certified CADDIS Training Participant Schedule* below. A detailed daily training schedule will be developed for participants based on the course modules. It is expected that two classrooms will be needed to accommodate the Certified CADDIS Training at each identified location. Training during the Pilot will include one session at each identified location. Training during Wave 1, Wave 2, and Wave 3 will include two sessions at each identified location. Each session will include all of the Certified CADDIS Training modules. Each session will accommodate 12 participants for a total of 24 participants at each location.

Each session will take nine days to complete and will include all of the Certified CADDIS Training modules. It is strongly recommended that Regional Centers select at least one participant to attend the entire session (all courses) to gain a clear understanding of CADDIS and how the modules and processes fit and link together throughout the system.

6.3.1 Pilot Certified CADDIS Training Participant Schedule

This training will be conducted at Inland Regional Center using one classroom and Valley Mountain Regional Center using one classroom. Participants will attend from Inland Regional Center and Valley Mountain Regional Center. The suggested CADDIS User Training dates for the Pilot are November 24, 2003 through December 12, 2003. *Table 6 – Training Schedule for Pilot Certified CADDIS Training* below lists the schedule for the Pilot Certified CADDIS Training. Training will begin on Monday, November 10, 2003. Please note, that Tuesday, November 11, 2003 is a State holiday. The schedule will accommodate morning and afternoon breaks, one hour lunchtimes, wrap ups at the end of each day, time for Presentation Skills training, and time for Sandbox practice.

Session One: Inland Regional Center

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Monday, November 10, 2003	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Monday, November 10, 2003	11:45 a.m. – 5:00 p.m.
	State Holiday- No classes	Tuesday, November 11, 2003	
	201-A Consumer Case Development (part two)	Wednesday, November 12, 2003	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, November 13, 2003	8:00 a.m. – 5:00 p.m.

Classroom	Training Courses	Date	Time
	201-B Quality Assurance	Friday, November 14, 2003	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, November 17, 2003	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, November 18, 2003	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, November 19, 2003	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, November 19, 2003	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, November 20, 2003	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, November 21, 2003	8:00 a.m. – 5:00 p.m.

Session Two: Valley Mountain Regional Center

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Monday, November 10, 2003	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Monday, November 10, 2003	11:45 a.m. – 5:00 p.m.
	State Holiday- No classes	Tuesday, November 11, 2003	
	201-A Consumer Case Development (part two)	Wednesday, November 12, 2003	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, November 13, 2003	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, November 14, 2003	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, November 17, 2003	8:00 a.m. – 5:00 p.m.

Classroom	Training Courses	Date	Time
	201-C Resource Development (part two)	Tuesday, November 18, 2003	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, November 19, 2003	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, November 19, 2003	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, November 20, 2003	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, November 21, 2003	8:00 a.m. – 5:00 p.m.

Table 6 – Training Schedule for Pilot Certified CADDIS Training

6.3.2 Wave One Certified CADDIS Training Participant Schedule

This training will be conducted in Sacramento and Fresno using two classrooms at each location. Participants for the Sacramento training will include staff from the Redwood Coast Regional Center, Far Northern Regional Center, Alta Regional Center, and North Bay Regional Center. Participants for the Fresno training will include staff from the Central Valley Regional Center, Kern Regional Center, and San Andreas Regional Center. Please note that the San Andreas Regional Center may move to Wave Two which would impact the number of participants that Central Valley Regional Center and Kern Regional Center can send to training.

The suggested CADDIS User Training dates for Wave One are February 2, 2004 through February 20, 2004. *Table 7 – Training for Wave One Certified CADDIS Training in Sacramento* below lists the schedule for the Wave One Certified CADDIS Training in Sacramento. *Table 8 – Training for Wave One Certified CADDIS Training in Fresno* below lists the schedule for the Wave One Certified CADDIS Training in Fresno. Because Monday, January 19, 2004 is a State holiday, this training will begin on Tuesday, January 20, 2004.

Session One: Sacramento

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, January 20, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, January 20, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, January 21, 2004	8:00 a.m. – 5:00 p.m.

Classroom	Training Courses	Date	Time
	201-A Consumer Case Development (part three)	Thursday, January 22, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, January 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, January 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, January 27, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, January 28, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, January 28, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, January 29, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, January 30, 2004	8:00 a.m. – 5:00 p.m.

Session Two: Sacramento

Classroom	Training Courses	Date	Time
Classroom Two or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, January 20, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, January 20, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, January 21, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, January 22, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, January 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, January 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, January 27, 2004	8:00 a.m. – 5:00 p.m.

Classroom	Training Courses	Date	Time
	201-C Resource Development (part three)	Wednesday, January 28, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, January 28, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, January 29, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, January 30, 2004	8:00 a.m. – 5:00 p.m.

Table 7 – Training Schedule for Wave One Certified CADDIS Training in Sacramento

Session One: Fresno

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, January 20, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, January 20, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, January 21, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, January 22, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, January 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, January 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, January 27, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, January 28, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, January 28, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, January 29, 2004	8:00 a.m. – 5:00 p.m.

Classroom	Training Courses	Date	Time
	201-D Fiscal (part three)	Friday, January 30, 2004	8:00 a.m. – 5:00 p.m.

Session Two: Fresno

Classroom	Training Courses	Date	Time
Classroom Two or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, January 20, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, January 20, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, January 21, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, January 22, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, January 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, January 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, January 27, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, January 28, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, January 28, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, January 29, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, January 30, 2004	8:00 a.m. – 5:00 p.m.

Table 8 – Training Schedule for Wave One Certified CADDIS Training in Fresno.

6.3.3 Wave Two Certified CADDIS Training Participant Schedule

This training will be conducted at a Bay Area and a Los Angeles location. The Training Lead will work with the DDS Training Officer to secure training classrooms at two Regional Centers if possible. Each location will include two classrooms. Participants for the Bay Area training will include staff from the East Bay Regional Center and Golden Gate Regional Center. Participants for the Los Angeles training will include staff from the Tri-Counties Regional Center, North Los Angeles County Regional Center, Westside Regional Center, San Gabriel/Pomona Regional Center, and San Diego Regional Center.

The suggested CADDIS User Training dates for Wave Two are March 2, 2004 through March 19, 2004. *Table 9 – Training Schedule for Wave Two Certified CADDIS Training in the Bay Area* below lists the schedule for Wave Two Certified CADDIS Training in the Bay Area. *Table 10 – Training Schedule for Wave Two Certified CADDIS Training in Los Angeles* below lists the schedule for Wave Two Certified CADDIS Training in Los Angeles. Please note that Monday, February 16, 2004 is President's Day which is a State holiday. Certified CADDIS Training will begin on Tuesday, February 17, 2004.

Session One: Bay Area

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, February 17, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, February 17, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, February 18, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, February 19, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, February 20, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, February 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, February 24, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, February 25, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, February 25, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, February 26, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, February 27, 2004	8:00 a.m. – 5:00 p.m.

Session Two: Bay Area

Classroom	Training Courses	Date	Time
Classroom Two or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, February 17, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, February 17, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, February 18, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, February 19, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, February 20, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, February 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, February 24, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, February 25, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, February 25, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, February 26, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, February 27, 2004	8:00 a.m. – 5:00 p.m.

Table 9 – Training Schedule for Wave Two Certified CADDIS Training in the Bay Area

Session One: Los Angeles

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, February 17, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, February 17, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, February 18, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, February 19, 2004	8:00 a.m. – 5:00 p.m.

	201-B Quality Assurance	Friday, February 20, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, February 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, February 24, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, February 25, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, February 25, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, February 26, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, February 27, 2004	8:00 a.m. – 5:00 p.m.

Session Two: Los Angeles

Classroom	Training Courses	Date	Time
Classroom Two or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, February 17, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, February 17, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, February 18, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, February 19, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, February 20, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, February 23, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, February 24, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, February 25, 2004	8:00 a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, February 25, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, February 26, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, February 27, 2004	8:00 a.m. – 5:00 p.m.

Table 10 – Training Schedule for Wave Two Certified CADDIS Training in Los Angeles

6.3.4 Wave Three Certified CADDIS Training Participant Schedule

This training will be conducted at one location in the Los Angeles area. The Training Lead will work with the DDS Training Officer to secure training classrooms at a Regional Center if possible. The location will include two classrooms for two sessions. Participants for this training include staff from the Regional Center of Orange County, South Central Los Angeles Regional Center, Lanterman Regional Center, Eastern Los Angeles Regional Center, and Harbor Regional Center.

The suggested CADDIS User Training dates for Wave Three are April 5, 2004 through April 23, 2004. *Table 11 – Training Schedule for Wave Three Certified CADDIS Training in Los Angeles* below lists the schedule for the Wave Three Certified CADDIS Training in Los Angeles. Please note that these Regional Centers do not observe Caesar Chavez Day. Therefore, classes will be held on Wednesday, March 31, 2004.

Session One: Los Angeles

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, March 23, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, March 23, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, March 24, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, March 25, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, March 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, March 29, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, March 30, 2004	8:00a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, March 31, 2004	8:00a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, March 31, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, April 1, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, April 2, 2004	8:00 a.m. – 5:00 p.m.

Session Two: Los Angeles

Classroom	Training Courses	Date	Time
Classroom One or via a web-based presentation	101 – CADDIS Fundamentals	Tuesday, March 23, 2004	8:00 a.m. – 11:45 a.m.
	201-A Consumer Case Development (part one)	Tuesday, March 23, 2004	11:45 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part two)	Wednesday, March 24, 2004	8:00 a.m. – 5:00 p.m.
	201-A Consumer Case Development (part three)	Thursday, March 25, 2004	8:00 a.m. – 5:00 p.m.
	201-B Quality Assurance	Friday, March 26, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part one)	Monday, March 29, 2004	8:00 a.m. – 5:00 p.m.
	201-C Resource Development (part two)	Tuesday, March 30, 2004	8:00a.m. – 5:00 p.m.
	201-C Resource Development (part three)	Wednesday, March 31, 2004	8:00a.m. – 12:30 p.m.
	201-D Fiscal (part one)	Wednesday, March 31, 2004	12:30 p.m. – 5:00 p.m.
	201-D Fiscal (part two)	Thursday, April 1, 2004	8:00 a.m. – 5:00 p.m.
	201-D Fiscal (part three)	Friday, April 2, 2004	8:00 a.m. – 5:00 p.m.

Table 11 – Training Schedule for Wave Three Certified CADDIS Training in Los Angeles

6.4 Training Schedule and Locations for System Administration Training

System Administration Training will take place at DDS and at each Regional Center prior to each Regional Center's go-live date. Two participants from DDS and each Regional Center can attend System Administration Training. If it is determined that a classroom is needed for this training, one will be secured at each Regional Center. System Administration will be two days in length.

Prior to System Administration Training, DDS will need to allow access by the Regional Centers to the Production and Sandbox Environments. This training will take place at each Regional Center during or shortly after their scheduled site Environment Validation dates as listed in the Project Workplan. The two DDS participants will receive this training during the Pilot Environment Validation scheduled dates. The schedule for System Administration Training is included in *Appendix 8 – Draft – Training Schedule and Locations for System Administration and Ad Hoc Report Training.*

Training Schedule and Locations for Ad Hoc Report Training

Ad Hoc Report Training will take place at DDS and at each Regional Center prior to each Regional Center's go-live date. Up to 12 participants from DDS and each Regional Center can attend this training. The Regional Centers must provide a classroom and computers for this training. Ad Hoc Report Training will be one day in length.

Installation of Actuate needs to occur prior to the Ad Hoc Report Training. Prior to Ad Hoc Report Training, the Actuate report software will need to be installed by the Regional Center on the participant workstations and verified by DDS/HHSDC as having appropriate access to the Production Reporting Server (CADR501).

This training will take place at each Regional Center during or shortly after their scheduled site Environment Validation dates as listed in the Project Workplan. The DDS participants will receive this training during the Pilot Environment Validation scheduled dates. The schedule for Ad Hoc Report Training is included in *Appendix 8 – Draft – Training Schedule and Locations for System Administration and Ad Hoc Report Training.*

6.5 Scheduling Dependencies

The successful scheduling of Certified CADDIS Training must take into account the following dependencies:

- In the event that there is a significant change in the implementation schedule, the Training Team will evaluate the new schedule and recommend new training dates to coincide with CADDIS implementation.

- The training curriculum for Certified CADDIS Training has been designed to incorporate the necessary CADDIS user processes in nine days of training. The first three hours and 45 minutes will provide a demonstration and an overview of CADDIS processes and all training participants must attend this course either via a web-based presentation or in the scheduled classroom. This will set the foundation for all remaining modules and will instill a conceptual knowledge of the flow of work and user processes. This will allow the remaining days to be exercise driven.

- In the event that a trainee's presence in a class is disruptive to other trainees, the trainer will notify the Training Lead who will communicate this to DDS. A disruptive trainee could impact the instructor's success in delivering the training in the time allotted.

- Certified CADDIS Training participants must attend the training that is scheduled for their Pilot or Wave so that they receive the training as close as possible to their Regional Center's implementation date.

- CADDIS User Training should not take place more than three weeks prior to the scheduled deployment of CADDIS at each Regional Center.

- Training participants for all CADDIS training should be notified of their scheduled training time and location at least one month prior to attending.

- Training participants for Certified CADDIS Training and CADDIS User Training must meet the course pre-requisites prior to attending training.

7 Training Evaluation

A standard best practice of instructor-led training programs is that training should be evaluated at the following two levels:

- An evaluation that measures the trainee's reaction to the training.

- An evaluation that measures trainee knowledge of the material.

To achieve this, the CADDIS Training Team will employ the following two levels of evaluation:

- **Level 1 Evaluations –** This evaluation process will measure the reaction of the user to the learning experience. A course evaluation will be completed by trainees at the end of each course. This evaluation will be used to assess the trainee's satisfaction with the training material, training content, presentation of training, facilities, and the instructor. A sample course evaluation form is included in *Appendix 7 – Sample Training Course Evaluation*.

- **Level 2 Evaluations –** This evaluation will measure the degree to which the trainee learned the material presented. This will be measured by administering and monitoring the results of the course exercises and mastery evaluations that are described in *Section 4.1 – Design Course Material Contents*.

In addition to the evaluations, a "scan call" will occur at the end of each training day during Certified CADDIS Training. The Training Lead will facilitate the call with the instructors to determine what went well, what went wrong and why. Instructors will be directed to handle problems at their level when possible. The purpose of these calls is to provide informal daily feedback, identify problems that occurred, and determine which problems require attention from someone outside the classroom level. The calls will also provide the opportunity for instructors to share tips and successes. A list will be kept of potential problem areas. This list will be provided to the CADDIS Implementation Management Team and DDS for review.

At the conclusion of Certified CADDIS Training for the Pilot, the Training Lead will prepare a brief summary for the CADDIS Implementation Management Team and CADDIS Project Management Team that will include a list of any issues that occurred during training and any issues that still need to be resolved. The CADDIS Implementation Management Team and CADDIS Project Management Team will review the summary to determine what action should be taken based on criticality, priority and timing to integrate feedback into the training during Waves One through Three.

8 Post Training Support

8.1 Training During the Warranty Year

At the end of Certified CADDIS Training for all Regional Centers, responsibility for ongoing training will transfer to DDS and the Regional Centers. The CADDIS Training Team will leave behind the material which is modular in nature and will easily support reuse and re-organization necessitated by changing staffing and business needs.

The one exception to this transfer in responsibility will be the delivery of follow-up sessions to train 48 new Certified CADDIS Trainers. This training will include two sessions at one location in Sacramento and two sessions at one location in Los Angeles. Each session will be nine days in length and will follow the same curriculum that is described in this Plan for Certified CADDIS Training. Each session will accommodate 12 participants. This will allow DDS and the Regional Centers to maintain a core of local super-users that may be reduced by turnover. The training will take place at 6 and at 12 months after the last Regional Center go-live. The proposed dates for these sessions are September 7, 2004 through September 17, 2004 and April 5, 2005 through April 15, 2005. The specific schedule and locations for these training sessions will be agreed upon by the CADDIS Training Team and the DDS Project Management Team.

The Training Team is responsible for providing the Final Training Materials as indicated in the Project Workplan timelines. DDS and the Regional Centers will be responsible for updating the training materials as appropriate for use by the Training Team for the 6 and 12 month training sessions.

8.2 Additional Training

In accordance with the RFP and contract, the CADDIS Training Team will provide additional Certified CADDIS Trainer sessions at the proposed session cost contained in the contract. These sessions must be requested in writing and must allow a minimum of 60 days notice to complete all necessary preparation activities prior to the desired session dates.

9 CADDIS Roles and Responsibilities

This section describes the roles and responsibilities of the CADDIS Training Team, DDS, the Regional Centers, Certified CADDIS Trainers, and CADDIS User Training Participants in facilitating the design, development and delivery of CADDIS training.

9.1 CADDIS Training Team Roles and Responsibilities

The CADDIS Training Team's role will be to lead the planning, design, development and delivery of training to Regional Center and DDS staff that have been defined as "in-scope" for CADDIS Training. The CADDIS Training Team will be responsible for the following:

- Develop the appropriate CADDIS training curriculum, including the courses, sequence of modules, length of each course, and suggested target audiences.

- Work with DDS to distribute the training curriculum, Certified CADDIS Training schedule, System Administration Training schedule, and Ad Hoc Report Training schedule to the Regional Centers for use in assigning training participants.

- Develop and test training material to support CADDIS training and compile them into Instructor and Participant Guides.

- Assist DDS in determining the appropriate participants from each Regional Center and finalizing training dates for Certified CADDIS Training.

- Secure classrooms for Certified CADDIS Training.

- Provide necessary equipment for Certified CADDIS Training, including computers, if it is not available at the training location.

- Provide Instructors for Certified CADDIS Training.

- Manage the Training Environment.

- Manage and monitor the execution of this Plan.

- Prepare and deliver Certified CADDIS Training sessions to approximately 120 Regional Center participants.

- Prepare and deliver System Administration Training to 44 DDS and Regional Center Technical and Help Desk staff.

- Prepare and deliver Ad Hoc Report Training for up to 12 participants at DDS and each Regional Center.

- Prepare training material to be used by Certified CADDIS Trainers during CADDIS User Training.

- Distribute one copy of the Instructor and Participant Guides to DDS in both soft and hard copy format.

- Secure training sites for Certified CADDIS Training if existing DDS or Regional Center facilities are not available.

- Monitor and report the status of the design, development and deployment of CADDIS training.

- Transition the training material, material maintenance procedures, and training program knowledge to appropriate DDS staff upon the completion of all Certified CADDIS Training.

- Provide 6 and 12 month training during the warranty year.

9.2 DDS Roles and Responsibilities

DDS will assist the CADDIS Training Team by coordinating with Regional Centers to obtain resources required to support training, communicate training milestones to Regional Centers, and facilitate the review and approval of documents that guide the development and deployment of training in a timely fashion.

DDS will be responsible for the following:

- Securing a classroom, computers, and equipment for the pilot Certified CADDIS Training at Valley Mountain Regional Center.

- Work with the Regional Centers to identify a Training Coordinator for each center who will serve as the point-of-contact for training activities.

- Review and approve this Plan.

- Work with the Regional Centers to identify the appropriate recipients for Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training.

- Work with the Regional Centers to identify the appropriate users/roles for each CADDIS User Training course.

- Coordinate with Regional Centers to schedule Certified CADDIS Training, System Administration Training, and Ad Hoc Report Training participants.

- Provide issue resolution/escalation in a timely manner as needed.

- Work with the CADDIS Training Team to identify existing, available training facilities and needed equipment at Regional Centers for Certified CADDIS Training.

- Monitor the scheduling of users to validate that everyone is enrolled and training slots are utilized appropriately.

- Actively participate in the planning of training, including material review, to validate the acceptance of training deliverables and adherence to training requirements.

- Prepare users for CADDIS through communication of CADDIS capabilities and any changes in policy or procedure.

- Answer DDS policy and procedure questions and address issues raised during CADDIS training.

- Maintain and update training materials after turned over by CADDIS Training Team.

9.3 Regional Center Roles and Responsibilities

The Regional Centers will be responsible for the following:

- Regional Center Subject Matter Experts who are selected by DDS will review training modules and return their comments to the DDS Training Officer within the scheduled 48 hours.

- Identify Regional Center Training Contacts who will communicate training activities to the Regional Center, assist with scheduling the training, and assist with identifying appropriate Regional Center classrooms for training.

- Ensure that all trainees are PC literate, have appropriate knowledge of DDS and Regional Center policies and procedures, and have appropriate job skills and knowledge prior to CADDIS training.

- Assign the appropriate staff as Certified CADDIS Trainers once the curriculum and schedule is received.

- Assign the appropriate staff for System Administration Training and Ad Hoc Report Training.

- Answer policy and procedure questions and address issues raised during CADDIS training.

- Confirm that identified staff attend the training to which they are scheduled.

- Coordinate all CADDIS User Training to be conducted by the Certified CADDIS Trainers at their Regional Centers.

9.4 Certified CADDIS Trainee's Roles and Responsibilities as a Trainer

The CADDIS Training Team will train Certified CADDIS Trainers who will then conduct instructor-led CADDIS User Training for Regional Center staff.

During CADDIS User Training, the Certified CADDIS Trainers will be responsible for the following instructional activities:

- Meet the pre-requisites identified in *Section 4.4.1 – Recommendations for Certified CADDIS Training Participants.*

- Set up the appropriate training classrooms, including computers and equipment.

- Arrive prior to class start time, prepared to teach the curriculum defined for the user group.

- Confirm that there is access to the CADDIS Training Environment from each computer. Instructions for accessing and using the CADDIS Training Environment, including the set-up of users, will be provided during Certified CADDIS Training.

- Confirm that the appropriate amount of course handouts are available.

- Provide Regional Center management staff with a report of classroom attendance, including no-shows and participants who only attended part of the course.

- Support users as they practice using CADDIS, answer questions, and track unanswered questions for follow-up with DDS.

- Report any technical problems to the CADDIS Help Desk. Instructions for reporting technical problems and receiving technical help will be provided during Certified CADDIS Training.

9.5 CADDIS User Training Participants' Roles and Responsibilities

The role of each CADDIS User Training participant is to attend user training, practice using the CADDIS application, and apply the CADDIS application to their job.

The training participants will be responsible for the following:

- Meet the pre-requisites identified in *Section 6.2.1 – CADDIS User Pre-requisites*.

- Know the impact of CADDIS on their roles and responsibilities.

- Complete any relevant policy, procedure, and job training classes provided by their Regional Center prior to attending CADDIS training.

- Attend training during their scheduled time, arrive on time, and maintain a focus on CADDIS training throughout the training session.

10 Appendix 1 – Certified CADDIS Training Curriculum

Day One – Web-Based Presentation – 8:00 a.m. – 11:45 a.m.
CADDIS 101 – CADDIS Fundamentals
Course Curriculum

Course Module	Estimated Module Length	Module Components
Introduction	15 minutes	• **Expectation setting for CADDIS Training** • **Review of objectives for Certified CADDIS Training**
CADDIS Navigation Overview	45 minutes	• **Home page navigation and message center processes** • **Main menu** • **Headers and buttons including Help** • **Tabs and flags** • **Types of fields**

CADDIS Demonstration	1 hour	• **Walk through of CADDIS processes including:**
		  o **Call Logging and Screening Overview**
		  o **Consumer Overview**
		  o **Consumer Trust Overview**
		  o **Provider Overview**
		  o **Purchase of Services Overview**
		  o **Quality Assurance Overview**
		  o **Operations Invoicing**

Break	15 minutes	
Demonstration of System Setup	45 minutes	• **CADDIS Regional Center structure** • **Overview of system security and setup activities** • **Workflow and alerts** • **Signing and co-signing**
Reporting	30 minutes	• **Report parameters** • **Sort options for reports** • **Report viewing and printing** • **Access to ad hoc reports**
Wrap up	15 minutes	

Day One (11:45 a.m. – 5:00 p.m.)

CADDIS 201-A Consumer Case Development

Course Curriculum

Course Module	Estimated Module Length	Module Components
Lunch	1 hour	
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise** • **Printing in CADDIS** • **Custom comments and tokens**
Call Screening and Logging	30 minutes	• **Enter a screening record for a Consumer** • **Enter a call logging record**
Consumer Profiles	1 hour	• **Migration from a Pre-Consumer to a Consumer** • **Consumer advanced and statewide searches (including Consumer duplicate checks)** • **Creating Consumer Profiles** • **Consumer summary pages**
Break	15 minutes	
Insurance and Benefits	30 minutes	• **Insurance records and linking insured persons to payor plans** • **Medi-Cal records** • **SSI and Wage benefits for Consumers (including pre-trust Consumers)**
Eligibility and Referrals	45 minutes	• **Consumer applications** • **Eligibility determination** • **In-house and external referrals**
Wrap Up	15 minutes	

Day Two (8:00 a.m. – 5:00 p.m.)

CADDIS 201-A Consumer Case Development

Course Curriculum

Course Module	Estimated Module Length	Module Components
Notice of Action and Consumer Appeals	30 minutes	• **Notice of Action records and linking to other records** • **Appeals for Consumers** • **Attaching appeals for Consumers** • **Associating appeals to other events** • **Recording and reviewing appeal levels and status**
Episodes and Service Periods	45 minutes	• **Internal service periods (admissions) for a consumer** • **Viewing the episode associated with the service period** • **Entering and changing primary staff information on the Episode** • **Service period closing** • **Intra-Regional Center transfers**
Diagnosis Entry	15 minutes	• **Axis I-V diagnostic information**
Break	15 minutes	
Service Planning and Reviews	1 hour and 15 minutes	• **Creating service plans (IPP or IFSP)** • **Creating plan reviews**
Assessments	1 hour	• **Overview of available assessments** • **Overview of standard assessment flags and processes** • **Entering TCM services** • **Creating CDER and Early Start Assessments** • **Reporting consumer progress**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Provider Searches	30 minutes	• **Searching for providers** • **Adding needed resource records**
Break	15 minutes	

Course Module	Estimated Module Length	Module Components
Provider Authorization	1 hour	• **Selecting a Consumer and a Provider Program** • **Selecting services and rates** • **Creating a financial resources record** • **Creating an authorization record** • **Linking a service plan** • **Signing the authorization** • **Creating a new version** • **Viewing Provider Payment Authorization History**
Consumer Trust Management	30 minutes	• **Identify a trust Consumer** • **Review trust information** • **Disbursement requests**
Wrap up	15 minutes	
Sandbox Practice	30 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Miscellaneous exercises**

Day Three (8:00 a.m. – 5:00 p.m.)
CADDIS 201-A Consumer Case Development
Course Curriculum

Course Module	Estimated Module Length	Module Components
Service Entry and Notes	1 hour	• **Progress note entry for services provided** • **Service entries and linking to progress notes** • **Linking progress notes to Service Plans and Assessments**
Legal Status and Conservator Tracking	30 minutes	• **Creating legal status records and events** • **Associating legal status records to legal events** • **Linking responsible parties to contact records**
Waiver Tracking	30 minutes	• **Creating waiver eligibility and criteria records** • **Creating consent records**
Break	15 minutes	
Special Incident Reports	1 hour	• **Creating special incident reports** • **Creating informed parties, involved parties, and inquiry records** • **Associating events to the Special Incident Report** • **Entering follow up and outcome information (including mortality information)** • **Adding correspondence information** • **Signing the report**
Medication Tracking	30 minutes	• **Creating medication records** • **Searching for medications and providers**
Review the Consumer Case Records Summary Screen	15 minutes	• **Highlights and navigation in the Consumer Case Records Summary Screen**
Lunch	1 hour	
Presentation Skills	1 hour	• **Using the Training Environment** • **Teach-back session**
Case Transfers	1 hour	• **Overview of Transfer types** • **Transfer summary information** • **Creating agreement records for shared case management consumers** • **Creating requests and agreements to transfer cases to other Regional Centers**
Break	15 minutes	
Consumer Notes	15 minutes	• **Creating system-wide chart notes on a consumer record**

Consumer Reports	30 minutes	• **Review of available Consumer reports**
Wrap Up	15 minutes	

Sandbox Practice	45 minutes	• **Mastery evaluation and miscellaneous exercises**
		• **An exercise for Budget Creation for Self-Directed Consumers will be available for applicable Regional Center participants:**
		   o **Creating consumer budget and broker records**
		   o **Associating waivers**
		   o **Creating dollar entry records**
		   o **Associating budget entries to provider authorizations**

The following additional CADDIS User Training Material will be developed for Managers:

- Approvals

- Reviewing outstanding staff calendars, caseloads, outstanding tasks, and unit tasks.

Day Four (8:00 a.m. – 5:00 p.m.)
CADDIS 201-B Quality Assurance
Course Curriculum

CADDIS Module	Estimated Module Length	Module Detail
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise**
Quality Assurance Monitoring	45 minutes	• **Creating a monitoring visit** • **Adding findings, interview, follow up and correspondence information** • **Associating the monitoring record to other events** • **Signing the record**
Break	15 minutes	
Quality Assurance Evaluations	30 minutes	• **Creating an evaluation record** • **Adding team, interviews, findings, follow up and correspondence information** • **Associating the evaluation to other events** • **Signing the record**
Quality Assurance Technical Assistance	30 minutes	• **Creating a new technical assistance record** • **Entering assistance team and attendee information** • **Associating the technical assistance to other events**
Quality Assurance Complaints and Rapid Response	30 minutes	• **Creating complaint records** • **Creating compliant Inquiries** • **Creating rapid response reports**
Quality Assurance Immediate Danger	30 minutes	• **Creating an Immediate Danger record** • **Recording Findings and Informed Parties information**
Lunch	1 hour	
Presentation Skills	45 minutes	• **Using the Training Environment** • **Teach-back session**

CADDIS Module	Estimated Module Length	Module Detail
Corrective Plans	30 minutes	• **Creating a Corrective Plan** • **Recording meeting and distribution data** • **Identifying citations and recording actions** • **Tracking the action**
Sanctions	30 minutes	• **Creating Sanction records** • **Managing and tracking sanctions**
Break	15 minutes	
Recording Provider Notes	15 minutes	• **Recording a note for a provider**
Viewing, updating, and attaching Special Incident Reports to Quality Assurance events	30 minutes	• **Viewing Special Incident Reports** • **Updating Special Incident Reports** • **Attaching Special Incident Reports to other Quality Assurance events**
Quality Assurance Reports	15 minutes	• **Review of available Quality Assurance reports**
Wrap Up	15 minutes	
Sandbox time	45 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Mastery evaluation and miscellaneous exercises**

Day Five (8:00 a.m. – 5:00 p.m.)

CADDIS 201-C Resource Development

Course Curriculum

Course Module	Estimated Module Length	Module Detail
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise**
Provider Organizations	45 minutes	• **Creating Provider Organization records** • **Associating Consumers to Provider Organizations**
Break	15 minutes	
Provider Locations	1 hour	• **Creating Provider Location records** • **Association of Locations to Organizations** • **Vendoring Regional Center re-assignment**
Provider Programs and Capacity Management (part one)	1 hour	• **Creating Provider Program records including identifying a liaison and associating a program with a location** • **Associating Programs to locations** • **Service identification and service attribute assignment for Programs** • **Discussion of generic programs** • **Creating a home managed by an AFHA provider** • **Waiver and exception assignments for Programs** • **Provider service periods**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Provider Programs and Capacity Management (part two)	30 minutes	• **Creating Program capacity records including population, accessibility attributes and individual openings** • **Linking Consumers to Programs** • **Creating non-vendored providers**

Course Module	Estimated Module Length	Module Detail
Provider Fiscal and Business Data	45 minutes	• **Creating Provider location tax records** • **Attaching Provider location tax records to Provider programs** • **Creating Provider location bank records**
Break	15 minutes	
Wrap Up	15 minutes	
Sandbox Practice	1 hour and 15 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Miscellaneous exercises**

Day Six (8:00 a.m. – 5:00 p.m.)
CADDIS 201-C Resource Development
Course Curriculum

Course Module	Estimated Module Length	Module Detail
Provider Staff	1 hour	• **Creating Provider Staff records** • **Associating Provider Staff and consultants with Provider Programs** • **Regional Center Staff sharing**
Provider Searches	30 minutes	• **Searching for Providers** • **Adding Needed Resources records**
Break	15 minutes	
Provider Application Tracking	1 hour	• **Creating Provider Applications** • **Tracking documentation and application status** • **Recording dispositions** • **Creating new Programs for applicants** • **Assigning emergency status for Consumer Living Situations** • **Creating Program Design records** • **Providing new program development funds**
Provider Appeals	45 minutes	• **Creating appeals for Residential Providers and on-going vendors** • **Attaching appeals to an applicant and Provider Program** • **Associating appeals to other events** • **Recording and reviewing appeal levels and status**
Lunch	1 hour	
Presentation Skills	1 hour	• **Using the Training Environment** • **Effective exercise supervision** • **Teach-back session**
Provider Rates (part one)	1 hour	• **Review the Provider Authorization process** • **DDS Global Schedule rates** • **Creating rounding rules for Provider rates** • **Creating and approving new Provider rates**
Break	15 minutes	
Provider Rates (part two)	45 minutes	• **Rate updates and audit trails** • **Creating rate agreements** • **Consumer accommodation rates** • **Approving rate agreements**

Course Module	Estimated Module Length	Module Detail
Provider Contracts	1 hour and 15 minutes	• **Creating contracts** • **Tracking fiscal management items** • **Attaching loan records** • **Establishing Dollar Based limits** • **Contract tracking, documentation and follow-up** • **Contract approval**
Wrap up	15 minutes	

Day Seven (8:00 a.m. – 12:30 p.m.)
CADDIS 201-C Resource Development
Course Curriculum

Course Module	Estimated Module Length	Module Detail
Transportation Routes and Requests	1 hour and 30 minutes	• **Searching for appropriate routes** • **Adding transportation routes** • **Identifying origination points, destination points, and stops** • **Creating a transportation request and entering Consumer information** • **Requesting new routes and identifying Provider program hours** • **Assigning a Consumer to a route**
Provider Notes	30 minutes	• **Creating notes for a Provider**
Break	15 minutes	
Resource Development Reports	30 minutes	• **Review of available Resource Development reports**
Viewing Special Incident Reports	15 minutes	• **Viewing Special Incident Reports**
Wrap Up	15 minutes	
Sandbox Practice	1 hour and 15 minutes	• **Mastery evaluation and miscellaneous exercises**

Day Seven (12:30 p.m. – 5:00 p.m.)

CADDIS 201-D Fiscal

Course Curriculum

Course Module	Estimated Module Length	Module Components
Lunch	1 hour	
Course Overview	15 minutes	**Welcome and Housekeeping items** **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	**Logging into CADDIS** **Viewing the Home Page** **Practice navigating between menus, tabs and flags** **Viewing on-line help** **Practice navigating between fields using a Scheduling exercise** **Printing in CADDIS** **Custom comments and tokens**
General Ledger	45 minutes	**Creating a new general ledger account** **Viewing account transactions and general journal batch information details** **Creating and posting a general journal batch** **Creating a recurring general journal batch**
Break	15 minutes	
Fixed Asset Management	30 minutes	**Entering a fixed asset record** **Copying a fixed asset to a new record** **Creating a depreciation record** **Entering a disposal record**
Budget Management	45 minutes	**Viewing and editing a budget list** **Adding a general ledger account to an existing budget worksheet** **Creating a new budget worksheet** **Copying a budget** **Merging budgets** **Viewing budgets using the budget tool** **Creating a budget batch** **Posting an adopted budget** **Creating a restricted fund record** **Associating a restricted fund record to a general ledger segment**
Wrap Up	15 Minutes	

Day Eight (8:00 a.m. – 5:00 p.m.)
CADDIS 201-D Fiscal
Course Curriculum

Course Module	Estimated Module Length	Module Components
Provider Authorizations	30 minutes	• **Creating a new Provider authorization** • **Selecting services and rates** • **Creating a financial resources record** • **Creating a new Provider authorization review record** • **Linking a service plan measurable** • **Signing a Provider authorization** • **Creating new versions**
Provider Authorization Payment History	15 minutes	• **Viewing a payment record** • **Viewing an authorization** • **Viewing payment histories by Consumers, authorizations and Provider programs**
Provider Invoices	1 hour	• **Creating a participation invoice record** • **Generating a payment invoice** • **Printing a paper invoice** • **Creating an attendance file record to export an invoice** • **Creating an online billing record** • **Entering and verify participation data** • **Editing and accruing invoices** • **Identifying batch invoices ready to be accrued**
Break	15 minutes	
Accounts Payable Adjustments	45 minutes	• **Creating an invoice adjustment** • **Creating a percentage reduction invoice adjustment** • **Creating a dollar amount invoice adjustment** • **Creating a refund record** • **Creating a payment correction** • **Creating a retro-rate change record**
Garnishments	30 minutes	• **Lesson One – How to search for and create a garnishment record** • **Lesson Two – How to apply the garnishment before issuing a payment** • **Lesson Three – How to specify the liability and AP accounts for credit memos or invoices based on a garnishment**

Course Module	Estimated Module Length	Module Components
Operations Invoicing	45 minutes	• **Creating an operations vendor record** • **Entering additional information to the vendor record** • **Creating a distribution matrix** • **Creating a classification code** • **Entering bank information for an operations vendor** • **Creating a purchase order** • **Entering an invoice**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Accounts Payable	45 minutes	• **Creating and posting an account payable invoice batch** • **Preparing payments and printing checks** • **Recording a manual check** • **Setting up an ACH record** • **Issuing a payment by creating an EFT file for ACH processing** • **Voiding a check** • **Deleting an operations check** • **Posting the journal entry to the general ledger**
Break	15 minutes	
Accounts Receivable	45 minutes	• **Creating a Transaction Code** • **Creating a manual invoice batch** • **Editing an open invoice** • **Creating a recurring invoice batch** • **Posting an invoice batch**
Loan Management	30 minutes	• **Entering a loan terms record** • **Editing a repayment schedule record** • **Creating a disbursements record** • **Viewing a transaction history and calculate payoff**
Wrap Up	15 minutes	
Sandbox Time	30 minutes	

Day Nine (8:00 a.m. – 5:00 p.m.)

CADDIS 201-D Fiscal

Course Curriculum

Course Module	Estimated Module Length	Module Components
Bank Reconciliation	30 minutes	• **Creating a bank reconciliation** • **Entering payment information** • **Entering bank adjustments** • **Entering general ledger adjustments** • **Viewing and printing a reconciliation report**
State Claims	30 minutes	• **Lesson One – How to generate a state claim** • **Lesson Two – How to review a state claim**
Consumer Trust Management (part one)	1 hour	• **Creating a trust bank account** • **Associating a trust account to a bank** • **Creating an employer record** • **Creating a benefit agency record** • **Searching for a consumer** • **Entering a trust account record for a consumer** • **Creating a Consumer asset record** • **Creating a Consumer employment record** • **Creating a Consumer allocation record**
Break`	15 minutes	
Consumer Trust Management (part two)	2 hours	• **Processing a recurring receivables** • **Un-committing funds in batch maintenance** • **Creating, applying and processing a manual receipt** • **Applying receipts to receivables** • **Creating an interest record** • **Creating an adjustment** • **Creating an disbursement batch** • **Processing a disbursement batch**
Lunch	1 hour	
Presentation Skills	1 hour	
Federal and State Reporting	25 minutes	• **Processing a 1099 report** • **Processing EDD reporting, record submitting, resubmitting, and correspondence reports**
Fiscal Reports – Sorting, viewing, and printing	20 minutes	• **Review of available fiscal reports**

Course Module	Estimated Module Length	Module Components
Break	15 minutes	
Fiscal Audits	45 minutes	**Creating pre-audit records** **Creating finding, fiscal outcomes and audit activity records** **Creating Provider contact, documentation, and correspondence records** **Associating Consumers to fiscal audits**
Wrap Up	15 minutes	
Sandbox Practice	45 minutes	**Mastery evaluation and miscellaneous exercises**

The following additional CADDIS User Training Material will be developed for Managers:

- Approvals

- Reviewing outstanding staff calendars, caseloads, outstanding tasks, and unit tasks.

Certified CADDIS Training Pre-requisites

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. An understanding of Regional Center policies and procedures.
Current job skills	Experienced and competent in the Regional Center's current business processes and systems. An understanding of the Regional Center's current processes that relate to the participant's job.
DDS Training	Service Coordinator's attending Certified CADDIS Training must first attend the CDER and/or Early Start assessment training that will be delivered by DDS staff.
CADDIS Fundamentals	Successful completion of CADDIS 101 – Fundamentals course prior to attendance at any of the subsequent Certified CADDIS Training courses.
Trainer Skills	An eagerness to learn and willingness to teach others in CADDIS.

11 Appendix 2 – System Administration Training and Ad Hoc Report Training Curriculum

Day One (8:00 a.m. – 5:00 p.m.)

CADDIS 301-A System Administration Training for DDS

Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
Overview of System Administration processes	1 hour	• **Overview of DDS System Administration responsibilities** • **Overview of Regional Center Administration responsibilities** • **Report Sharing**
Option Lists	1 hour	• **Adding items to DDS controlled cross reference codes and option lists** • **Modifying and updating DDS controlled option lists**
Break	15 minutes	
User Set up	45 minutes	• **Creating new user accounts and passwords** • **Updating and deleting user accounts and passwords** • **Reactivating user accounts**
Lunch	1 hour	
System Security	1 hour	• **Structure security** • **Tab level security** • **Role-based security** • **Security maintenance**
User Group Set up	1 hour	• **Creating new user groups** • **Adding users to groups using the user group and user screens** • **Assigning screen access to user groups**
Break	15 minutes	
IP Masking	15 minutes	• **Allowing and denying access through IP addresses**
User Sessions	15 minutes	• **Viewing user sessions**
Global Variables	30 minutes	• **Setting up Global Variables including Security Global Variables**
Customizing the Help Screen	45 minutes	• **Updating and deleting customized Help screens**

CADDIS Module	Estimated Module Length	Module Components
System Setup (part one)	1 hour	• **Setting the time zone** • **Entity setup** • **Access setup** • **Menu setup** • **Enterprise setup**

Day Two (8:00 a.m. – 5:00 p.m.)

CADDIS 301-A System Administration Training for DDS

Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
System Setup (part two)	2 hours and 30 minutes	**Custom comments** **Assessment setup** **TCM setup** **IPP setup** **Inter and Intra-Regional Center Transfers** **Service Provider fee level setup** **Service Code setup** **Custom comment setup** **Correspondence entry setup** **State report setup** **Legal Status setup** **Medication setup** **Universal lookup** **Form Configurator** **License Type Groups** **Adding and deleting license type groups** **Adding and deleting license types** **Updating license types and license type groups** **Diagnosis Maintenance** **Setting up screens** **Setting up code versions** **Diagnostic code setup** **Adding DSM and ICD codes** **Mapping DSM to ICD codes** **GAF maintenance**
Break	15 minutes	
Fiscal and Trust Administrative Setup	1 hour	**General Ledger segment and account setup** **DDS contract and rate schedule setup** **Procedure code setup** **Allocation Breakdown setup for Trust**
Work Flow Processing and alerts (part one)	1 hour	**Work flow and alert setup**
Lunch	1 hour	
Work Flow Processing and alerts (part two)	2 hours	**Work flow and alert setup**
Break	15 minutes	

CADDIS Module	Estimated Module Length	Module Components
Work Flow Processing and alerts (part three)	30 minutes	• **Work flow and alert setup**
Enhancements to Service Codes	30 minutes	• **Identifying service codes for payable services** • **Identifying service codes for Federal Home and Community Based Waivers** • **Identifying General Ledger expense codes for authorizations and payments**

Day One (8:00 a.m. – 5:00 p.m.)
CADDIS 301 – B System Administration Training for Regional Centers
Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
Overview of System Administration for Regional Centers	1 hour	• **Overview of DDS System Administration responsibilities** • **Overview of Regional Center System Administration responsibilities** • **Report Sharing**
User Set up	1 hour	• **Creating new user accounts and passwords** • **Updating and deleting user accounts and passwords** • **Reactivating user accounts**
Break	15 minutes	
User Group Set up (part one)	2 hours	• **Overview of user, episode, and authorized employee user assignments** • **Creating new user groups** • **Adding users to groups using the user group and user screens** • **Role Based Security**
Lunch	1 hour	
User Group Set up (part two)	1hour	• **Assigning screen access to user groups** • **User assignment to restricted tabs (tab level security)**
User Sessions	15 minutes	• **Viewing user sessions**
System Setup (part one)	1 hour	• **Organization setup** • **Facility setup** • **Signing and co-signing rights setup**
Break	15 minutes	

System Setup (part two)	1 hour and 15 minutes	• **Custom comments**
		• **Audit trail setup**
		• **Inter and Intra-Regional Center Transfers**
		• **Clinical setup**
		  o **Configuring the service plan library**
		  o **Service plan types**
		  o **Service plan review types**
		  o **Case note types**

Day Two (8:00 a.m. – 5:00 p.m.)
CADDIS 301 – B System Administration Training for Regional Centers
Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
System Setup (part three)	1 hour	• **Form Configurator** • **Custom comments setup** • **Viewing the error log**
Fiscal and Trust Administrative setup (part one)	1 hour	• **Creating General Ledger accounts** • **Setting up payor groups** • **Setting up payor group rankings**
Break	15 minutes	
Fiscal and Trust Administrative setup (part two)	1 hour and 45 minutes	• **Setting up service codes** • **Creating payor plans** • **Updating and deleting payor plans** • **Adding exclusion rules** • **1099 setup** • **General Ledger account setup for Trust Administration** • **Disbursement frequency setup for Trust Money Management disbursements**
Lunch	1 hour	
Work Flow Processing and alerts (part one)	2 hours	• **Work flow setup**
Break	15 minutes	
Work Flow Processing and alerts (part one)	1 hour and 45 minutes	• **Alerts setup** • **Messaging setup**

Pre-requisites for 301-A and 301-B

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. An understanding of Regional Center policies and procedures.
Current job skills	Experienced and competent with System Administration processes.

Pre-Requisite	Description
Technical Skills	SQL or other database experience and a high-level understanding of System Architecture
CADDIS Training	Prefer participants who have attended Certified CADDIS Training. . This will provide participants with knowledge of CADDIS user processes and will increase their understanding of how System Administration functions fit into CADDIS.

One Day (8:00 a.m. – 5:00 p.m.)
CADDIS 302 – Ad Hoc Report Training
Course Curriculum

CADDIS Module	Estimated Module Length	Module Detail
Report writing overview	1 hour	**Overview of Actuate** **Overview of report server components** **Using the Actuate User Manual** **Using the Data Dictionary as a tool**
Using the Wizard	1 hour	**Building a report using the Wizard**
Break	15 minutes	
Building Letters	1 hour and 45 minutes	**Building a letter using template** **Changing the letter format** **Building a letter without a template** **Customizing the letter**
Lunch	1 hour	
Building Reports	1 hour and 45 minutes	**Adding to a report template** **Changing the report format** **Building a report without a template** **Customizing the report**
Break	15 minutes	
Report Sharing	1 hour	**Publishing the report** **Sharing access to the report**
Editing reports	1 hour	**Editing an existing CADDIS report**

Pre-requisites for 302

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	Solid understanding of DDS and Regional Center policies and procedures
Current job skills	Experience and competence with current DDS or Regional Center report building and report running processes.
CADDIS Training	Prefer participants who have attended Certified CADDIS Training. This will provide participants with knowledge of CADDIS user processes and will increase their understanding of how *ad hoc* report functions fit into CADDIS.

12 Appendix 3 – Sample Mapping to Target Audiences

This appendix is intended as a sample matrix to serve as a guide for Regional Centers to determine which users should attend the various training modules during CADDIS User training. Regional Centers can use this template and include the appropriate headings for their Regional Center. They can also use the template to identify the appropriate CADDIS User Training audiences based on the curriculum outlined in Appendix 1.

Sample of Modules per End-User Group		Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
#	Modules														
1	**101 Introduction to CADDIS**														
	All modules	X	X	X	X	X	X	X	X	X	X	X			
2	**201-A Consumer Case Development**														
	Call Logging and Screening	X	x												
	Consumer Profiles		X	X											
	Insurance and Benefits		X	X											
	Eligibility and Referrals		X	X											
	Notice of Action and Consumer Appeals		X	X											
	Episodes and Service Periods		X	X											
	Diagnosis Entry		X	X											
	Service Planning and Reviews		X	X											
	Assessments		X	X											
	Provider Searches		X	X											
	Provider Authorizations		X	X											
	Consumer Trust Management		X	X											
	Service Entry and Notes		X	X											
	Legal Status and Conservator Tracking		X	X											
	Waiver Tracking		X	X											

#	Modules	Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
	Special Incident Reports		X	X											
	Medication Tracking		X	X											
	Review the Consumer Case Records Summary Screen		X	X											
	Case Transfers		X	X											
	Consumer Notes		X	X											
	Consumer Reports		X	X								X			
3	**201-B Quality Assurance**														
	Quality Assurance Monitoring						X								
	Quality Assurance Evaluations						X								
	Quality Assurance Technical Assistance						X								
	Quality Assurance Complaints and Rapid Response						X								
	Quality Assurance Immediate Danger						X								
	Corrective Plans						X								
	Sanctions						X								
	Recording Provider Notes						X								
	Viewing, updating, and attaching Special Incident Reports to Quality Assurance Events						X								
	Quality Assurance Reports						X					X			

#	Modules	Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
4	**201-C Resource Development**														
	Provider Organizations				X										
	Provider Locations				X										
	Provider Programs and Capacity Management				X		X	X	X						
	Provider Fiscal and Business Data				X		X								
	Provider Staff				X			X	X						
	Provider Searches		X		X										
	Provider Application Tracking				X										
	Provider Appeals				X		X								
	Provider Rates				X			X	X						
	Provider Contracts				X			X	X						
	Transportation Routes and Requests				X			X	X						
	Resource Development Reports				X										
	Viewing Special Incident Reports				X							X			

#	Modules	Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
5	**201-D Fiscal**														
	Consumer Trust Management							X			X				
	Provider Authorizations							X	X						
	Fiscal Audits							X							
	Generate Turnaround Invoices								X						
	Operations Invoicing									X					
	Garnishments								X	X					
	Accounts Payable								X	X					
	Accounts Payable Adjustments								X	X					
	Provider Authorization Payment History								X	X					
	Bank Reconciliation							X							
	Accounts Receivable							X							
	General Ledger							X							
	State Claims							X							
	Fixed Asset Management							X							
	Budget Management							X							
	Loan Management							X							
	Federal and State Reporting							X	X	X	X				
	Fiscal Reports							X	X	X	X	X			

13 Appendix 4 – Sample Participant Guide for CADDIS Training

The California Developmental
Disabilities Information System

CADDIS User Training

Sample – Participant Guide

CADDIS 201-A Consumer Case Development

Preface

About This Guide

Welcome to the Consumer Case Development course. Now that you've taken the CADDIS Fundamentals course you will continue to learn CADDIS processes that apply to your job as a Service Coordinator. This Participant Guide contains a course overview and is organized by course modules. Each module contains the following sections:

- Module objectives

- A module overview

- CADDIS terminology that you will need to know

- Lessons for each module

- Exercise instructions with data to be used for each exercise

- A module summary

In addition, tips and tricks are included in this Guide to help you navigate through CADDIS. At the end of the course, you will take a mastery evaluation which is similar to the exercises but will include processes that tie all of the course modules together. The mastery evaluation will be an open-book exercise and you will be able to use the training material and User Manual as references.

Training Approach

During each lesson, your instructor will demonstrate a particular procedure in CADDIS and will discuss related dependencies and CADDIS process flows. You will observe as the instructor demonstrates the procedure and navigates from screen to screen.

After the demonstration, you will be given the opportunity to practice the same procedure in CADDIS. At the start of the course, your instructor will provide you with a User ID and password that you will use throughout the course. This User ID and password will allow you to log onto the CADDIS Training Environment. The Training Environment will not include Regional Center specific information but will include data and information that you will need to complete each exercise.

Tips for the Student

- At the beginning of this course, you will also receive a copy of the CADDIS User Manual. This manual contains step-by-step procedures for CADDIS user processes. You can use this Manual during training to help guide you through the CADDIS screens as you complete your exercises.

- CADDIS has online Help functions for each screen. You can use Help during the course exercises to guide you through specific CADDIS processes. At the end of each course you will be given additional exercises that you can practice on your own. You will be given a User ID and password for the CADDIS Sandbox Environment. This environment is similar to the Training Environment and will allow you to practice CADDIS processes in a safe setting before you begin using CADDIS at work.

- Be sure to complete the course evaluation that your instructor will give you. Your feedback is valuable in determining the success of the course and providing the instructor with information that will help improve this course in the future.

- Let's get started!

Course Overview

This course will teach you the CADDIS processes that are related to Consumer Case Development activities for Regional Centers.
The processes are organized into the activities:

- CADDIS Navigation
- Call Logging and Screening
- Consumer Profiles
- Insurance and Benefits
- Eligibility and Referrals
- Notice of Action and Consumer Appeals
- Episodes and Service Plans
- Diagnosis Entry
- Service Planning and Reviews
- Assessments
- Provider Searches
- Provider Authorizations
- Consumer Trust Management
- Service Entry and Notes
- Legal Status and Conservator Tracking
- Waiver Tracking
- Special Incident Reports
- Medication Tracking
- Review the Consumer Case Records Summary Screen
- Case Transfers
- Consumer Notes
- Consumer Reports

Note – This section of the training material will also include high-level flow charts and other overview information for the course. The section below includes a sample module with one sample lesson and exercise. The actual look and feel of the headers will be consistent with the training modules that are currently being reviewed by DDS and Regional Center Subject Matter Experts.

Module Three - Consumer Profiles

Module Objectives

In this CADDIS module, you will learn the following:

- How to migrate a Pre-Consumer to a Consumer status

- How to search for a Consumer using advanced and statewide lookup

- How to create a new Consumer, including:

    ✓ Name and address records

    ✓ Residence functionality for default addresses

    ✓ Demographics

    ✓ Special populations

    ✓ Accommodations

    ✓ Identification flag

    ✓ Contacts

- How to view the Consumer summary page

You will also have the opportunity to practice the following additional exercises:

- How to add a health provider to the Consumer record

- How to add a telephone record

- How to update a Consumer record

Module Overview

The Consumer is the foundation of the CADDIS system. An individual must be in the system as a Consumer in order to track episodes of care (e.g., admissions and services) and authorizations, as well as to bill services to Providers. CADDIS tracks Consumers, provides case information, and authorizes and pays providers for services rendered. In some circumstances, CADDIS will also bill payors for services provided by the Regional Center. The **Consumer** screen serves as the master record for a Consumer and is a critical element in providing information for other

modules throughout the system.

You can create Consumer records in one of two ways: by migrating a Pre-Consumer screening record or by creating a brand new Consumer. This information is the foundation for entering Consumer diagnostic information, Consumer eligibility, service plans, assessments, and a variety of other Consumer case information.

CADDIS allows for a wide range of Consumer and Consumer relationship data to be collected. Information concerning the Consumer and other related parties is collected throughout the time that the Consumer is associated with a Regional Center. CADDIS collects and stores information historically, as the Consumer's situation can change over time. This aids the Regional Center in providing quality services to the Consumer and coordinating with other individuals, groups or agencies that also support the Consumer.

Lesson One - Migrate a Pre-Consumer to a Consumer

Lesson Objective

During this lesson, you will learn how to migrate an individual from a Pre-Consumer to a Consumer status.

Lesson Overview

In the Call Logging and Screening module you learned how to create a Pre-Consumer. Once a Pre-Consumer has been entered into CADDIS and it is determined through screening that the individual will be a Consumer, you can easily migrate the individual's information to obtain a Consumer ID.

If you did not enter the individual's Social Security Number or Name Types when entering the person as a Pre-Consumer, you will now be required to do so.

> **NOTE**
> If you do not know the Consumer's Social Security Number, or if they do not have a SSN, enter [99999999] in the SSN field.

Exercise One - Migrate a Pre-Consumer to a Consumer

This exercise will teach you how to migrate a Pre-Consumer to a Consumer. You will use the Pre-Consumer you created in the Call Logging and Screening module.

First, your instructor will briefly demonstrate this functionality.
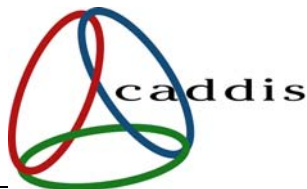
> **NOTE** Remember, the online-help in CADDIS and the CADDIS User Manual can also help to guide you through these steps.

1. Log into CADDIS with the User ID and password provided by your instructor.

2. Select **Access** from the Main Menu.

3. Select **Consumer** from the sub-menu.

4. Click within the **Consumer** field and enter the Pre-Consumer last name that you added in Module Two. Instead of entering the full name the system allows you to enter the initial part of the full name. Now press the **Tab** key. The system will now search for and display the matching Consumer(s). Or, you may click the **Consumer** hyperlink and select the Consumer for the displayed list.

5. Click **Edit /View**. The Pre-Consumer's **Screening** screen will appear.

6. Click **Update**. A screen will appear, prompting you to create a Consumer associated with this screening.

7. Click **Yes**. You have successfully created a Consumer record with a Consumer ID.

8. If you did not originally enter the Consumer's **Social Security Number** and **Name Types**, these are now required fields. Enter **[the first five digits of your social security number and 5555 as the last four digits]** and any name type you would like.

14 Appendix 5 – Sample Course Outline for CADDIS User Training

The California Developmental Disabilities Information System

Course Name:	**_Resource Development_**				
Course Code:	201-C	Estimated Duration:		Delivery Method:	Instructor-led with hands-on exercises
Training Material:	❑ Participant Guide ❑ CADDIS User Manual ❑ CADDIS Training Environment			Target Audience	

Course Purpose

This course provides training on the Resource Development activities in CADDIS. Participants will learn how to create Provider records, conduct Provider searches, track Provider applications, and establish Provider rates and contracts. Participants will practice what they learn using the course exercises.

The online help and CADDIS User Manual will be as reference material throughout the course. At the end of the course, participants will complete a course mastery evaluation to reinforce the integration of all of the Resource Development activities.

Course Pre-requisites

- A general understanding of the purpose and capabilities of CADDIS.
- An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area.
- An understanding of Regional Center and office specific business processes and procedures.
- Knowledge and experience in Resource Development tasks.
- General PC literacy skills including an adequate level of experience and general comfort using computers in a Microsoft Windows and Internet Explorer 5.5 environment.
- Completion of the CADDIS Fundamentals course.

Course Objectives

By the end of this course participants will be able to perform the following activities in CADDIS:

- Create provider records including records for non-vendored providers
- Create provider tax and bank records
- Conduct provider searches based on criteria such as geography and potential hazards
- Create and track provider applications
- Create provider rates and contracts
- View Special Incident Reports for providers
- Manage provider appeals
- View, sort, and print provider reports

Course Details

This course covers the following CADDIS user processes:

Provider Organizations:

- Creating provider organization records
- Associating consumers to provider organizations
- Creating records for non-vendored providers

Provider Locations:

- Creating provider location records
- Associating locations to organizations
- Changing the vendoring Regional Center
- Entering location and organization bank and tax information

Provider Programs:

- Creating provider program records
- Associating provider programs to locations
- Service identification and service attribute assignment for programs
- AFHA vendor homes and consumers
- Waiver and exception assignments for programs
- Provider service periods
- Provider notes
- Creating program capacity records including population, accessibility attributes and individual openings
- Linking consumers to programs

Provider Staff:

- Creating provider staff records
- Associating provider staff and consultants to provider programs

Course Details

- Regional Center staff sharing

Provider Searches:

- Searching for providers
- Adding needed resources records

Provider Application Tracking:

- Creating provider applications
- Tracking documentation and application status
- Recording dispositions
- Creating new programs for applicants
- Assigning emergency status for consumer living situations
- Creating program design records
- Providing new program funds

Provider Appeals:

- Creating appeals for Residential Providers and on-going vendors
- Attaching appeals to an applicant and Provider Program
- Associating appeals to other events
- Recording and reviewing appeal levels and status

Provider Rates:

- Review of the Provider Authorization process
- DDS Global Schedule rates
- Creating rounding rules for provider rates
- Creating and approving new rates
- Rate updates and audit trails
- Creating rate agreements
- Consumer accommodation rates
- Approving rate agreements

Provider Contracts:

- Creating contracts
- Tracking fiscal management items
- Attaching loan records
- Establishing dollar based limits
- Contract tracking, documentation and follow-up
- Contract approval

Transportation Routes and Requests:

- Adding transportation routes
- Identifying the origination points, destination points, and stops

Course Details

- Identifying provider program hours for consumers
- Add route assignments
- Creating transportation requests

Provider Notes:

- Creating notes for Provider records

Resource Development Reports:

- Review of available Resource Development reports

Special Incident Reports:

- Viewing Special Incident Reports

15 Appendix 6 – Training Classroom Certification Checklist

The California Developmental Disabilities Information System

Training Site:

Training Dates:

Classroom Preparation Dates:

Classroom Requirements

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	A minimum of two separate classrooms large enough to accommodate 13 occupants (12 trainees and 1 instructor) Pilot Regional Centers only need to provide one classroom		
	A sufficient number of chairs and desks/tables for all participants, including a table for supplies and training material. The trainee desks should be large enough for a PC and training material		
	Sufficient open space for instructors to move throughout the classroom and assist trainees		
	Sufficient space so that all participants can view information projected on a screen		
	Sufficient distance from the screen to the last row of seats (should not		

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	exceed six screen-widths)		
	Sufficient distance from the front row seat to the projection screen (should be at least the width of the screen, preventing discomfort or fatigue)		
	Sufficient distance from the left and right of the projection screen (participants should not be seated more than one screen-width to the left or right of the screen).		
	The screen should have enough elevation to be seen by the last row of participants.		
	Classrooms should have equipment such as a Polycom telephone for the CADDIS 101 – Fundamentals course. The equipment must allow off-site and in-class participants to hear the instructor.		
	Classrooms should have connectivity to the Internet for 13 desktops. Regional Center classrooms should have intranet connectivity to HHSDC. There should be T1 or faster connectivity to the Internet		
	There should be access to a water fountain or cooler		
	There should be access to nearby restrooms in sufficient number to accommodate the trainees within a 15 minute break time frame		
	There should be window blinds if ambient light will prevent projector viewing		

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	There should be adjustable lighting (front dimmer switches) to provide sufficient illumination while information is projected on the screen		
	There should be sufficient heating/air conditioning systems to create a comfortable learning environment		
	Access to the training site by instructors should be available outside of normal business hours (nights and weekends)		
	There should be access for trainees with special needs (such as wheelchair access)		
	There should be adequate parking for all training participants. Alternate or public transportation will also be considered, such as nearby bus stops or MUNI/BART for Bay Area locations.		
	There should be a secure space (i.e. storage closet) to store training material		
	There should be sufficient electrical outlets and surge protectors for PCs and other equipment. Room power supply should be adequate to support the power needs of 13 PCs, a projector, printer, and other needed equipment.		

Classroom Supplies and Equipment

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	Trash can		
	Course signage for the lobby and classroom door		
	A contact person name and phone number for site emergencies and network problems		
	A flipchart, easel, and tape		
	Participant name tents		
	A whiteboard, markers, and erasers		
	A projection screen		
	A printer that is compatible with the instructor's computer		
	An InFocus (Proxima or similar) projector compatible with the pixel size of CADDIS screens for a full display of screens.		
	Extension cords (if needed)		

Classroom Computers: There should be 13 computers that meet the following requirements

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	Windows 95 or later operating system		
	Minimum 400 MHz CPU		
	Minimum 128 MB RAM		

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	Minimum 8 GB Disk Storage		
	Minimum of 800 X 600 monitor resolution (although 1024 X 768 is recommended to reduce scrolling on the screens)		
	Internet Explorer 5.5 or later		
	Cookies enabled on each workstation		
	SSL encryption enabled on each workstation		
	Ethernet NIC Connection (10/100 Base-T or TX NIC)		

Classroom Preparation by the Trainers

Meets Requirements (yes/no)	Requirement	Notes	Requirement Met and ready for Training
	Have all above requirements been met?		
	Is training material available and in sufficient number for the course participants?		
	Is a sign-in sheet ready?		
	Has each computers been tested for connectivity to the Training Environment?		
	Has the Proxima been connected to the instructor's computer?		
	Is the printer connected to the instructor's computer?		

16 Appendix 7 – Sample Training Course Evaluation

CADDIS Training Class Evaluation

Course Name:		Date:	
Instructor:		Location:	
Regional Center:			

This evaluation will provide your instructor and the CADDIS team with valuable feedback for the training program. Please circle the number that best represents your opinion on questions 1-10. If you choose the answer of 'Poor' for any question, please explain and add any specifics in the 'additional comments' field below".

Question	Poor	Average	Good	Very Good	Excellent
1. Your overall rating of this training course	1	2	3	4	5
2. Your overall rating of the instructor	1	2	3	4	5
3. The instructor's understanding of the subject	1	2	3	4	5
4. The instructor's presentation skills	1	2	3	4	5
5. The instructor's level of preparation and organization	1	2	3	4	5
6. The instructor's willingness and ability to answer student's questions	1	2	3	4	5
7. The quality and comfort of the classroom environment	1	2	3	4	5
8. The quality and usefulness of the training material	1	2	3	4	5
9. The quality and usefulness of the course exercises	1	2	3	4	5
10. The quality and usefulness of the course mastery evaluation	1	2	3	4	5

Please answer items 11-13 below. If you need more room, please use the back of this evaluation form.

11. What was the best thing about this course?

_____

12. If you could change one thing about this course what would it be?

_____

13. Please make any additional comments about this course.

_____

When you have completed this evaluation, please return it to your instructor.

17 Appendix 8 – Draft – Training Schedule and Locations for System Administration and Ad Hoc Report Training

Comments:

- This training has been scheduled to occur after the environment readiness activities have been completed at a Regional Center. Final environment validation will be performed by the Technical Architect while she is onsite to do the System Administration/Ad Hoc Report Training at each Regional Center.
- Some of these dates overlap with Certified CADDIS Training in order to allow sufficient time for Regional Centers to conduct set-up activities after System Administration Training.
- This training has been scheduled so that it is completed at least three weeks prior to each Regional Center's scheduled Go-Live date.
- The Dev A environment at HHSDC will be used for the System Administration and Ad Hoc Report training. The Training Team will work with DDS staff to setup and test Dev A.
- The DDS training dates have been scheduled to allow at least two weeks for DDS to practice what they have learned so that they can be prepared to support the pilot Regional Centers.
- Becky Pipoly will forward the Implementation Tasks checklist to the Training Team for review to confirm that the appropriate functions are taught during the System Administration course.
- The Final Systems Operation Manual will be used for the DDS and pilot Regional Center training even if it is still under DDS review.
- For the periods of overlap in the System Administration and Ad Hoc Reporting training dates, the Regional Center will provide two classrooms.

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
PILOT						
DDS in Sacramento	10/27/03 – 10/28/03 (Trainer: Karen Steely)	10/30/03 (Trainer: Terry Koschel)	10/19/03 – 10/30/03	After training, participants can practice in DevA. On 12/1/03, DevA will need to be restored and all practice data will be deleted.	DDS will set-up their system in DevA from 12/1/03 to 12/5/03. It will then be restored during the weekend of 12/6/03	n/a

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
					and 12/7/03 in preparation for Inland and Valley Mountain to use.	
Inland Regional Center	11/12/03 – 11/13/03 (Trainer: Terry Koschel)	11/14/03 (Trainer: Terry Koschel)	11/10/03 – 11/21/03	DevA will be backed up over the weekend of 12/6/03-12/07/03 and restored for the pilot Regional Centers. They will then have from 12/8/03-12/12/03 to perform set-up activities for UAT. Another option is to include the set-up activities as part of UAT starting on 12/15/03.	The pilot Regional Centers will perform full set-up activities in the Production Environment from 1/19/03-1/23/03 for Wave 0 go-live.	12/15/03
Valley Mountain Regional Center	11/19/03-11/20/03- (Trainer: Karen Steely)	11/18/03 (Trainer: Terry Koschel)	11/10/03 – 11/21/03	DevA will be backed up over the weekend of 12/6/03-12/07/03 and restored for the pilot Regional Centers. They will then have from 12/8/03-12/12/03 to perform set-up activities for UAT. Another option is to include the set-up activities as part	The pilot Regional Centers will perform full set-up activities in the Production Environment from 1/19/03-1/23/03 for Wave 0 go-live. Another option is to include the set-up activities as part of UAT starting on 12/15/03.	12/15/03

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
				of UAT starting on 12/15/03.		
WAVE ONE						
North Bay Regional Center	12/10/03 – 12/11/03 (Trainer: Terry Koschel)	12/12/03 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04
Alta Regional Center	12/17/03 – 12/18/03 (Trainer: Karen Steely)	12/19/03 (Trainer: Karen Steely)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04
Central Valley Regional Center	1/7/04 – 1/8/04 (Trainer: Terry Koschel)	1/9/04 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03	2/23/04

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
				12/12/03) up through 2/9/03.	through 2/21/03.	
San Andreas Regional Center	1/14/04 – 1/15/04 (Trainer: Karen Steely)	1/16/04 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04
Far Northern Regional Center	1/21/04 – 1/22/04 (Trainer: Karen Steely)	1/23/04 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04
Kern Regional Center	1/26/04 – 1/27/04 (Trainer: Terry Koschel)	1/28/04 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
Redwood Coast Regional Center	1/29/04 – 1/30/04 (Trainer: Terry Koschel)	2/2/04 (Trainer: Terry Koschel)	1/20/04 – 1/30/04	The Wave One Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting on 12/12/03) up through 2/9/03.	The Wave One Regional Centers will have access to the Production environment for set-up activities from 2/9/03 through 2/21/03.	2/23/04
WAVE TWO						
San Diego Regional Center	2/4/04 – 2/5/04 (Trainer: Karen Steely)	2/6/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04
North Los Angeles Regional Center	2/10/04 and 2/11/04 (Trainer: Karen Steely)	2/9/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04
East Bay Regional	2/11/04 – 2/12/04	2/13/04	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to	The Wave Two Regional Centers will have access	3/22/04

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
Center	(Trainer: Terry Koschel)	(Trainer: Terry Koschel)		DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	to the Production environment for set-up activities from 3/8/03 through 3/19/03.	
Tri-Counties Regional Center	2/18/04 – 2/19/04 (Trainer: Karen Steely)	2/17/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04
Golden Gate Regional Center	2/18/04 – 2/19/04 (Trainer: Terry Koschel)	2/20/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04
Westside Regional Center	2/23/04 – 2/24/04 (Trainer: Karen Steely)	2/25/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
San Gabriel/Pomona Regional Center	2/26/04 and 2/27/04 (Trainer: Karen Steely)	3/1/04 (Trainer: Terry Koschel)	2/17/04 – 2/27/04	The Wave Two Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 2/6/03) and up through 3/8/03.	The Wave Two Regional Centers will have access to the Production environment for set-up activities from 3/8/03 through 3/19/03.	3/22/04
WAVE THREE						
Orange Regional Center	3/3/04 – 3/4/04 (Trainer: Karen Steely)	3/5/04 (Trainer: Terry Koschel)	3/23/04 – 4/2/04	The Wave Three Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 3/6/03) and up through 4/9/03.	The Wave Three Regional Centers will have access to the Production environment for set-up activities from 4/12/03 through 4/23/03.	4/26/04
South Central Regional Center	3/8/04 – 3/9/04 (Trainer: Terry Koschel)	3/10/04 (Trainer: Terry Koschel)	3/23/04 – 4/2/04	The Wave Three Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 3/6/03) and up through 4/9/03.	The Wave Three Regional Centers will have access to the Production environment for set-up activities from 4/12/03 through 4/23/03.	4/26/04
Harbor Regional Center	3/17/04 – 3/19/04 (Trainer: Karen Steely)	3/19/04 (Trainer: Terry Koschel)	3/23/04 – 4/2/04	The Wave Three Regional Centers will have access to DevA to practice as soon as their training has been	The Wave Three Regional Centers will have access to the Production environment	4/26/04

Training Locations	Proposed System Administration Training Dates	Proposed Ad Hoc Report Training Dates	Certified CADDIS Training Dates	Sandbox Practice Dates	System set-up Dates	Go-Live Date
				delivered (starting 3/6/03) and up through 4/9/03.	for set-up activities from 4/12/03 through 4/23/03.	
Eastern Los Angeles Regional Center	3/24/04 – 3/25/04 (Trainer: Karen Steely)	3/26/04 (Trainer: Terry Koschel)	3/23/04 – 4/2/04	The Wave Three Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 3/6/03) and up through 4/9/03.	The Wave Three Regional Centers will have access to the Production environment for set-up activities from 4/12/03 through 4/23/03.	4/26/04
Lanterman Regional Center	3/30/04 – 4/1/04 (Trainer: Karen Steely)	4/2/04 (Trainer: Terry Koschel)	3/23/04 – 4/2/04	The Wave Three Regional Centers will have access to DevA to practice as soon as their training has been delivered (starting 3/6/03) and up through 4/9/03.	The Wave Three Regional Centers will have access to the Production environment for set-up activities from 4/12/03 through 4/23/03.	4/26/04